



SnapReporter User Guide

© Copyright 2014 Bold Technologies LTD

Confidentiality Statement

All information contained in this document is provided in confidence and shall not be published or disclosed wholly or in part to any other party without the express prior written permission of Bold Technologies Limited. It shall be held in safe custody at all times. These obligations shall not apply to information that is published or becomes known legitimately from sources other than Bold Technologies Ltd.

Publish Date: August 2015

Bold Technologies Ltd 421 Windchime Place

Colorado Springs CO 80919 USA

Phone: +1-719-593-2829

Toll Free US: 1-800-255-2653 (BOLD)

Fax: +1-719-599-3953

Email: sales@boldgroup.com support@boldgroup.com

Acknowledgments

Microsoft and Windows are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. Likewise, the other products, services, and company names referred to in this document, all trademarks or registered trademarks of their respective owners, are all hereby acknowledged

Publisher

Bold Technologies, Ltd.

The information contained in this document represents the current information Bold Technologies Ltd has as per the date of publication. Because Bold Technologies must respond to changing market conditions, the information contained in this document should not be interpreted to be a commitment on the part of Bold Technologies. Furthermore Bold Technologies cannot guarantee the accuracy of any information presented after the date of publication.

Author

Bold Technologies Technical Writer

This document is for informational purposes only. The system descriptions and diagrams contained within should be used as guidelines only. Each Manitou installation may require modifications to meet specific requirements. BOLD TECHNOLOGIES LTD MAKES NO WARRANTIES, EXPRESS OR IMPLIED, IN THIS DOCUMENT.

| | |
|---|-----------|
| WELCOME..... | 1 |
| A BOLD INTRODUCTION..... | 1 |
| ABOUT BOLD TECHNOLOGIES..... | 1 |
| ABOUT MANITOU..... | 1 |
| ABOUT SNAPREPORTER | 2 |
| HOW TO USE THIS GUIDE | 2 |
| SYSTEM REQUIREMENTS | 2 |
| SNAPREPORTER OVERVIEW..... | 2 |
| FEATURES | 2 |
| WYSIWYG REPORTING | 3 |
| EXTENDED DATA SHAPING | 3 |
| MASTER-DETAIL..... | 3 |
| INTEGRATED REPORT ITEMS AND PRE-DEFINED APPEARANCES | 3 |
| MULTIPLE DATA SOURCES AND SIDE-BY-SIDE REPORTS..... | 4 |
| COMPATIBILITY, EXPORT AND LOCALIZATION..... | 4 |
| USER INTERFACE OVERVIEW | 4 |
| MAIN TOOLBAR | 4 |
| EDITING SURFACE | 5 |
| DOCKING PANELS | 6 |
| FIELD LIST | 7 |
| FIELD LIST OVERVIEW | 7 |
| REPORT EXPLORER..... | 8 |
| MAIN TOOLBAR OVERVIEW | 8 |
| STANDARD TOOLS..... | 8 |
| <i>File</i> | 8 |
| HOME | 9 |
| DATA | 9 |
| APPEARANCE | 10 |
| INSERT..... | 10 |
| PAGE LAYOUT | 10 |
| MAILINGS | 11 |
| VIEW | 11 |
| REVIEW | 12 |
| REFERENCES | 12 |
| OPTIONAL TOOLS | 12 |
| <i>Chart Tools – Design Tab</i> | 12 |
| <i>Table Tools – Layout Tab</i> | 13 |
| <i>Field Tools – Field Tab</i> | 13 |
| <i>Group Tools – Group Tab</i> | 14 |
| <i>List</i> | 14 |
| GETTING STARTED | 14 |
| HOW IT WORKS..... | 15 |
| STARTUP..... | 15 |

| | |
|--|-----------|
| REPORTING..... | 15 |
| CREATING A REPORT | 15 |
| <i>Connect to Data Source</i> | 15 |
| CREATE A NEW REPORT | 18 |
| CREATE A STANDARD REPORT | 18 |
| CREATE A MASTER DETAIL REPORT | 19 |
| OPEN AN EXISTING REPORT | 20 |
| EDITING A REPORT..... | 21 |
| MOVING FROM FIELD TO FIELD | 21 |
| ADDING AND REMOVING FIELDS AND COLUMNS IN A STANDARD REPORT | 22 |
| <i>Add a Column</i> | 22 |
| <i>Drag and Drop a Field Type</i> | 22 |
| <i>Remove a Column</i> | 22 |
| ADDING AND REMOVING FIELDS AND COLUMNS IN A MASTER DETAIL REPORT | 23 |
| ADJUSTING THE NUMBER OF DATA ROWS | 24 |
| APPLYING A DATE FORMAT | 25 |
| ADJUSTING TABLES, COLUMNS, AND ROWS | 25 |
| ARRANGING CONTENT | 26 |
| <i>Moving Data</i> | 26 |
| <i>Swapping Data</i> | 26 |
| MANAGING DATA..... | 26 |
| SORTING DATA | 27 |
| GROUPING DATA | 28 |
| MANAGING GROUPED HEADERS AND FOOTERS | 29 |
| FORMATTING DATA | 29 |
| CUSTOMIZING A REPORT | 30 |
| ADDING GRAPHICS | 30 |
| CALCULATING A SUMMARY FUNCTION | 31 |
| SUMMARY FUNCTION CUSTOMIZATION | 31 |
| APPLYING A CALCULATED FIELD | 32 |
| <i>Create a Calculated Field</i> | 32 |
| <i>Add a Calculated Field</i> | 36 |
| PASSING PARAMETERS TO A REPORT | 37 |
| ADDING A DATE RANGE PARAMETER | 41 |
| PREVIEWING THE PARAMETERIZED REPORT | 44 |
| IMPORTING PARAMETERS INTO MANITOU | 45 |
| CREATING A MULTI-COLUMN REPORT | 46 |
| CREATING A SIDE-BY-SIDE REPORT | 47 |
| ADDING A CHART TO YOUR REPORT | 49 |
| CHANGING CHART TYPE | 50 |
| SAVING AND DISTRIBUTING A REPORT | 52 |
| SAVE YOUR SNAP REPORT | 53 |
| PRINT OR EXPORT YOUR SNAP REPORT | 54 |
| IMPORTING A REPORT INTO MANITOU | 55 |

Welcome

Bold's SnapReporter is a straight-forward, drag-and-drop tool that offers a flexibility in reporting processes. SnapReporter is designed to:

- Generate Reports quickly and efficiently
- Provide easy-to-use design elements to customize the look and feel of created Reports
- Make creating Reports easy for those without knowledge of SQL scripting

A Bold Introduction

This manual is intended to provide instruction and reference for core features and functions within SnapReporter.

About Bold Technologies

Bold Technologies, an industry leader since 1981, has stood the test of time in central station and alarm automation software. Formerly known as Bradley On-Line Data Systems, Bold Technologies created the Bold Central Station Automation System and through the years, shaped the development of contemporary alarm monitoring by introducing faster and more sophisticated software innovations. We promote excellence and technological innovation through strategic partnerships and support of organizations dedicated to advancing industry standards. As a proven leader in the security industry, our strength is founded on a company-wide commitment to helping our customer group through superb products and services. This commitment guides our decisions for future development.

About Manitou

Bold Technologies, recognizing that the future was about innovations within the Windows® world, began building the Manitou system from the ground up in 1999. The first sites went live on this new-age monitoring system in 2002. The Manitou system was completely redesigned and revolutionary, opening the alarm industry up to new concepts and ideas.

This endeavor completely changed the industry paradigm, encouraging broad advancements industry-wide.

About SnapReporter

SnapReporter was created in order to provide a quick and easy solution for those who may not be equipped with SQL experience or situations requiring reports without the need for SQL scripting. SnapReporter was designed to work as a supplement to the Bold Advanced Report Writer – providing an easy-to-use, alternate means of creating reports. While the Advanced Report Writer provides seamless, very fine control through SQL scripting, SnapReporter provides the ability to design and write reports without SQL knowledge.

How to Use this Guide

This guide has been created with the intent for one topic to flow into the next and is meant to be viewed as a .pdf or in electronic form. Incorporated herein are overviews, key terms, and definitions as well as, step-by-step instructions on how to perform different tasks within the SnapReporter application.

System Requirements

- Manitou CS 1.6.1 with Patch 46 or higher
- SQL 2008r2 or greater
- SQL provides a means for SnapReporter to store settings and logs into a database

SnapReporter Overview

Introducing SnapReporter: Our new, easy-to-use and fully-featured reporting option that complements the Advanced Report Writer experience, and enhances our already feature-rich Standard Manitou Reports.

Features

The SnapReporter is a combination of a word processor and a Report control system. It significantly reduces the otherwise steep learning curve associated with traditional Report designers and allows you to deliver highly-intuitive solutions that meet and exceed end-user expectations. SnapReporter elevates ease-of-use and productivity to unrivaled levels.

WYSIWYG Reporting

SnapReporter is the true definition of WYSIWYG Reporting (What You See Is What You Get Reporting). Whether you are creating a new Report, modifying an existing Report or previewing it prior to printing, the document displays on screen exactly as it will look on paper. SnapReporter means no more dealing with the innate complexities of a traditional Report designer – no bands, and no more endless switching between design and preview modes.

Extended Data Shaping

Ease of use is not limited to the straightforward and highly productive nature of SnapReporter's MSWord-inspired functionality. The rich collection of data shaping options it offers have been engineered to simplify the way users approach reporting going forward.

These include:

- [Sorting Data](#)
- [Grouping Data](#)
- [Calculating a Summary Function](#)
- [Applying a Calculated Field](#)
- [Formatting Data](#)

Master-Detail

No reporting solution is complete without an elegant way to create, maintain, and modify hierarchical Reports. SnapReporter removes the limits associated with traditional sub-reports and makes it easy to generate even the most complex master-detail layouts with ease.

Integrated Report Items and Pre-Defined Appearances

SnapReporter includes a powerful collection of Report elements that no professional reporting solution can do without. From charts to check boxes, images to barcodes... it's a simple "drag-and-drop" operation with SnapReporter. And of course, modifying the appearance of a Report is easy – a simple mouse click allows you to apply built-in appearances to your Report instantly.

Multiple Data Sources and Side-by-Side Reports

So that users can create combined reports, SnapReporter allows you to easily bind your report to multiple unrelated data sources, such as Manitou and Manitou Service. And yes, side-by-side comparison Reports are as easy to create as a standard table or multi-column layout.

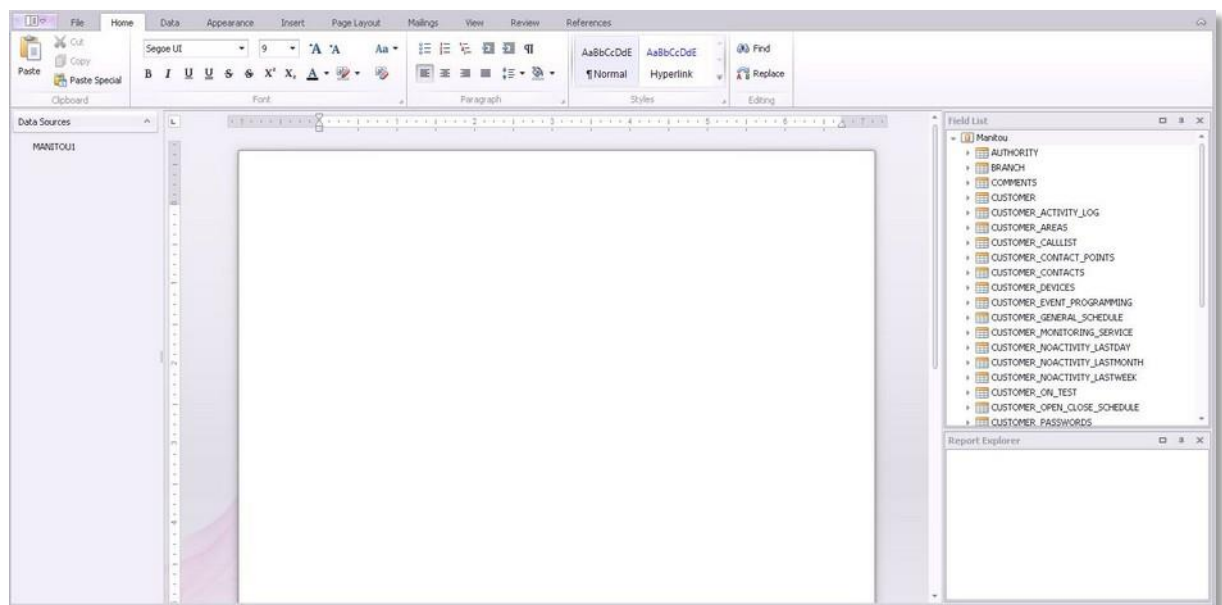
Compatibility, Export and Localization

When using SnapReporter, you can open any existing RTF or DOC(X) file and quickly embed your business data as needed. In addition, SnapReporter provides support for all popular export formats, including PDF, TXT, RTF, CSV, and image formats. And just like all Bold Technologies' products, SnapReporter can be fully localized to meet the language requirements of the user.

User Interface Overview

The SnapReporter user interface is made up of three primary elements:

- Main toolbar, or button ribbon
- Report editing surface
- Docking panels



Main Toolbar

The main toolbar's tabs accommodate numerous actions you can perform to improve your SnapReporter documents.

Editing Surface

The Report editing surface displays document pages as they look on paper.



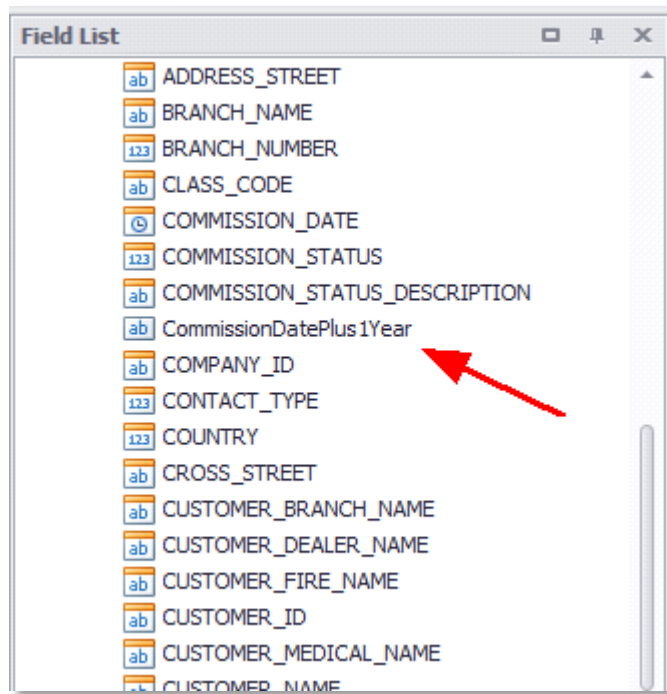
Docking Panels

Two docking panels are appended to the main work surface of SnapReporter: **Field List** and **Report Explorer**. These panels may be closed or hidden by clicking on either the **X** button or the **Auto Hide** button (designated by a pushpin button). When auto-hidden, you can easily access the panels again by navigating to the **View** tab, clicking the **Windows** option, and selecting the windows you want to unhide.



Field List

The **Field List** reflects available data sources and lists their members. It can also be used to create custom data members. **Error! Reference source not found.** ([Applying a Calculated Field](#)) which simulate the activity of common data fields and allow you to perform various calculations based on your data. In the example below, a calculated field that adds one year to the commissioning date has been added to the **Field List**.









Field List Overview

The **Field List** uses the following icons to distinguish between different data objects.

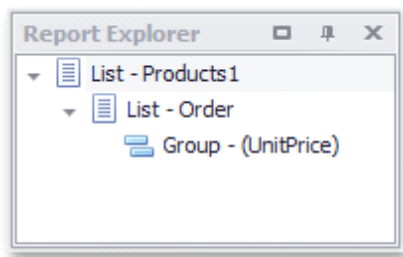
| Icon | Description |
|------|--------------------|
| | Dataset |
| | Data table or view |
| | Parameters |

Additionally, the **Field List** recognizes the following data field types.

| Icon | Description |
|---|------------------|
|  | Boolean |
|  | Byte |
|  | Calculated field |
|  | Date-time |
|  | Numeric |
|  | String |

Report Explorer

The **Report Explorer** reflects the current Report structure (for example, the fields it contains and any applied groupings).



Main Toolbar Overview

SnapReporter's main toolbar puts a wide variety of tools and actions at the user's fingertips.

Standard Tools

File

The **File** tab provides options pertaining directly to the Report file.

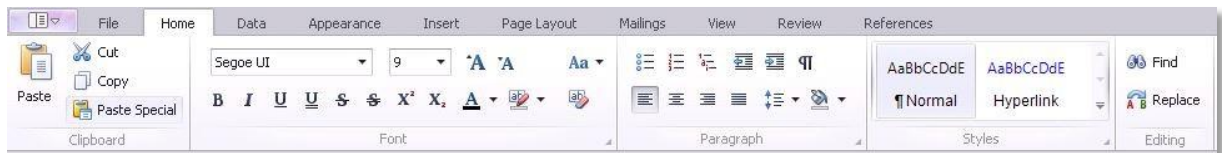
- Create a new Report
- Open an existing Report
- Save and print



Home

The **Home** tab provides all the standard formatting features typically used in manipulating a document.

- Select font size, type, and special effects
- Copy and cut
- Format paragraphs and lists
- Create hyperlinks
- Search



Data

Use the **Data** tab to manage the data in a Report.

- Set parameters (See [Passing Parameters to a Report.](#))
- Refresh to update any changes made
- View source and SQL information



Appearance

Quickly change a Report's appearance using a variety of available themes.



Insert

The **Insert** tab allows you to insert various objects into your Report.

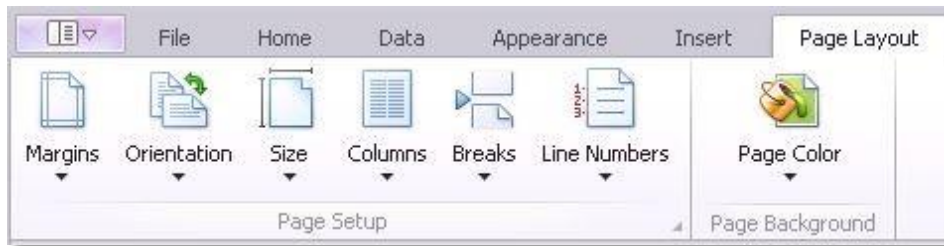
- Add tables, pictures, and charts
- Utilize check boxes and bar codes
- Format headers/footers and page breaks
- Insert symbols, links, and bookmarks



Page Layout

The **Page Layout** tab provides various options for laying out the data in your Report.

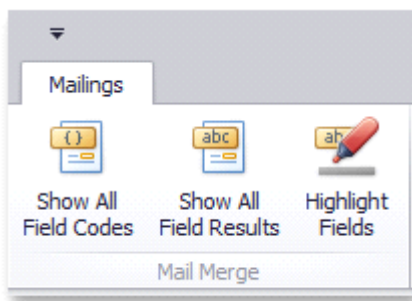
- Set margins and page size
- Orient the page vertically or horizontally
- Designate page breaks
- View or hide line numbers
- Select a page color



Mailings

The **Mailings** tab provides you the option of viewing field codes and field results commands. It also allows you to locate all data fields in a Report and highlight them so you can distinguish them from plain text fields. Easily toggle between views by clicking the buttons.

- Toggle between showing field codes and field result commands
- Highlight fields



View

On the **View** tab, in addition to various viewing functions, SnapReporter adds a special section with the following two commands: **Windows** and **Highlight**.

- Switch to various types of document views
- Make a ruler visible
- Use the zoom function
- View different design panels and windows
- Highlight a current element's type and boundary information



Review

Easily check for spelling errors in the **Review** tab.



References

Use the tools in the **References** tab to update contents, as well as manage captions and figures.



Optional Tools

In addition to the standard tabs on the main toolbar, there are a few tabs that display only when you need them.

Chart Tools – Design Tab

Utilize the **Design** tab to apply different types of design elements to your Report.

- Apply various chart designs - even 2D and 3D options
- Select colors

- Use templates
- Run the Chart Wizard

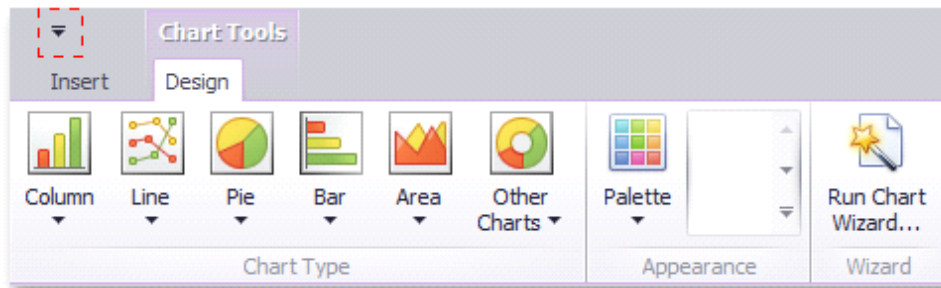
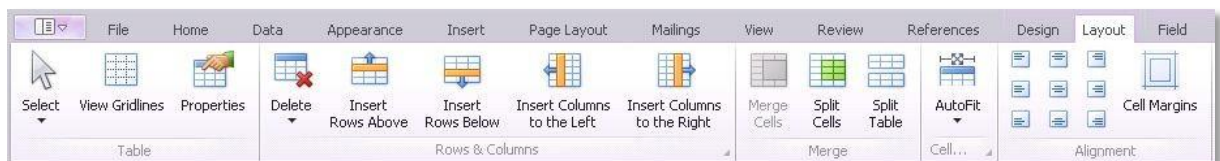


Table Tools – Layout Tab

Design the optimum look of any table in a report with the tools found in the **Layout** tab.

- Determine properties
- Manage columns and rows
- Define cell margins and alignment



Field Tools – Field Tab

The **Field** tab provides a means of shaping the data in your Report.

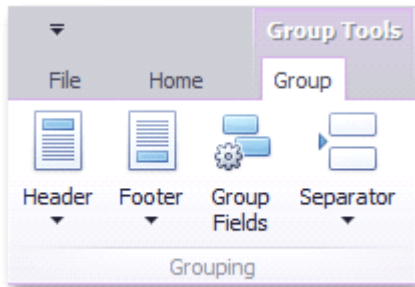
- View and manage field properties
- Group, sort, and summarize data



Group Tools – Group Tab

Once fields have been grouped, the **Group** tab activates. Use these tools to manage field groupings.

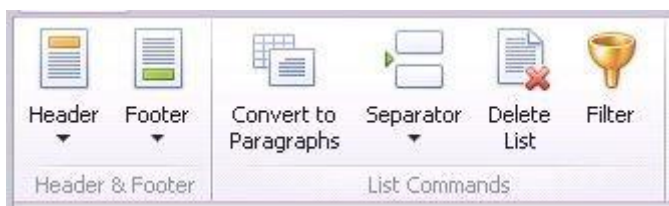
- Apply headers and footers to groups
- Launch the **Collection Editor** to manage grouped fields
- Insert various types of separators between fields



List

Use tools in the **List** menu to manage lists in your Report.

- Apply a header and/or footer
- Utilize separators
- Convert, remove, or filter a list



Getting Started

Getting started with SnapReporter is easy. Just identify a Report's criteria and what data you need. Then, drag and drop the fields you want and customize the Report to fit your needs.

How it Works

By using auto-query and drag-and-drop functionality, SnapReporter makes customizing and generating Reports very simple. Where Advanced Report Writer requires a firm understanding and ability to script SQL, SnapReporter only requires an understanding of Windows-based functionality. Users can now easily create, customize, compare, save, print, and export Reports on-the-fly.

Startup

The initial implementation of the SnapReporter will be done by a Bold representative. The SnapReporter software may be launched from the Start menu or the Desktop.

- Select SnapReporter from the Start Menu/Programs List (OR)
- To launch from your Desktop, double-click the **Bold SnapReporter** icon



Reporting

SnapReporter is all about reporting - quickly, easily, and efficiently. Once SnapReporter is fully set up, configuring and running a custom Report is a simple process.

Creating a Report

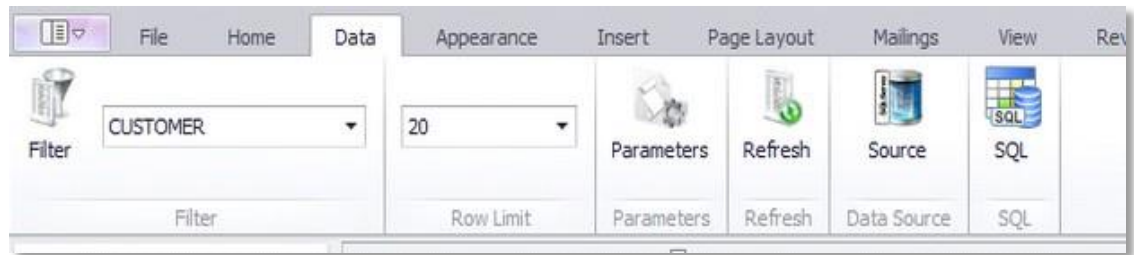
To create Reports, you must connect SnapReporter to a data source.

Connect to Data Source

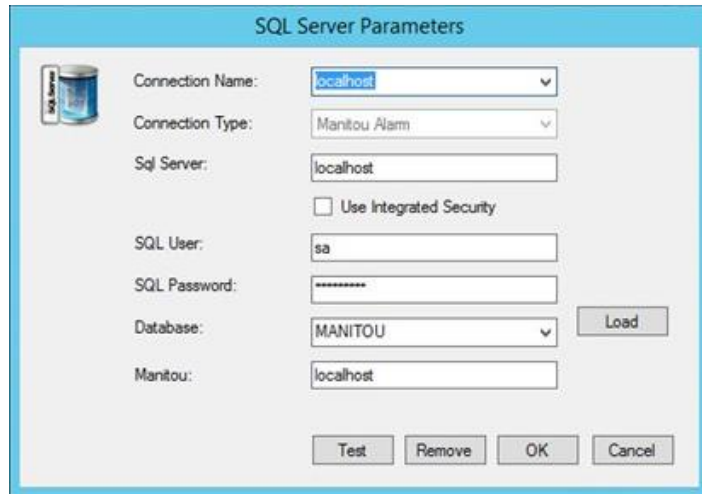
First, connect SnapReporter to a reliable data source.

1. Click **Data** from the toolbar at the top of the screen. From the **Data** menu choose the **Source** button.

Note: While multiple data sources may be available, only one database may be used at a time.



2. The **SQL Server Parameters** window displays.



3. Enter the appropriate database details for each Manitou system from which you want to report.

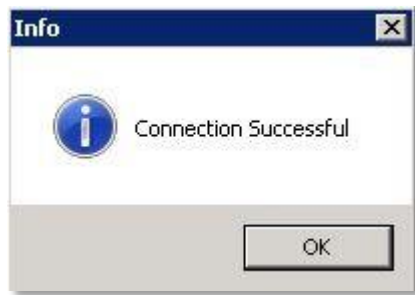
IMPORTANT:

- There is no automated rollover for Snap Reports if you perform a failover and your SQL Server is on a different system than your Manitou services and SnapReporter. In such an instance, you will need to change the data source each time you perform a failover.
- If your SQL Server is on the same system as your Manitou services and SnapReporter, you can set the data source to **localhost** and the rollover should occur without issue. Please note, **localhost** is the correct selection on the server. However, on a workstation the named server should be, for example, "manitou1" or "manitou2".
- Please note that SnapReporter must be installed on the Manitou Server in order to render reports from the Manitou Database.

4. Enter the host address of the Manitou Broker in the **Manitou** box.

Important: The **Manitou** box must be populated to correctly add the connection.

5. Click **Test** to check the connection.

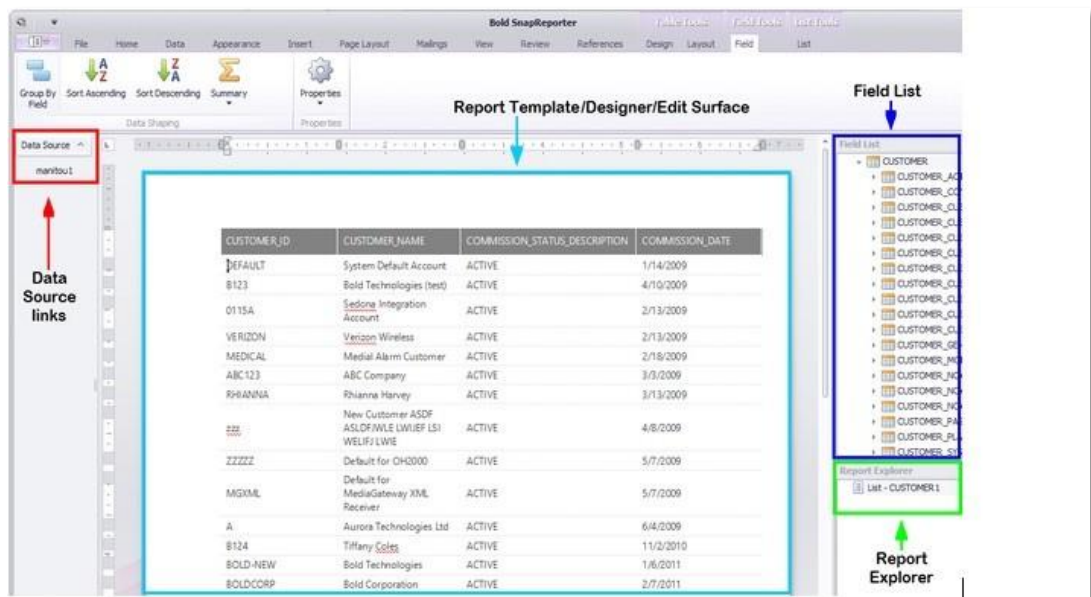


6. When the connection is acknowledged, click **OK** on the **Info** window, then click **OK** on the **SQL Server Parameters** window.

7. Add a connection for each machine where the Broker could run.

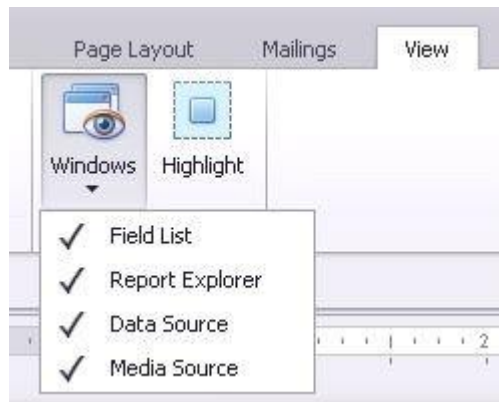
Note: When you click the **Source** button again, the original connection information displays in the **SQL Server Parameters** window. To create a new server connection, simply type over the existing text with the new connection information.

8. The **Data Source** link displays on the left side of the **Bold SnapReporter** main screen.



9. Click the **Data Source** link to populate the **Field List** on the right side of the screen.

Note: If the **Data Source** link does not display as described, click **View** and then click **Windows**. Confirm that **Data Source** is selected as shown in the following screenshot:



Create a New Report

Once SnapReporter has been connected to a data source, you can create a new Report. The Report creation process in SnapReporter is as simple as selecting the required items in the **Field List** and dropping them onto the surface of the Report.

On the **File** menu, click **New**.

Create a Standard Report

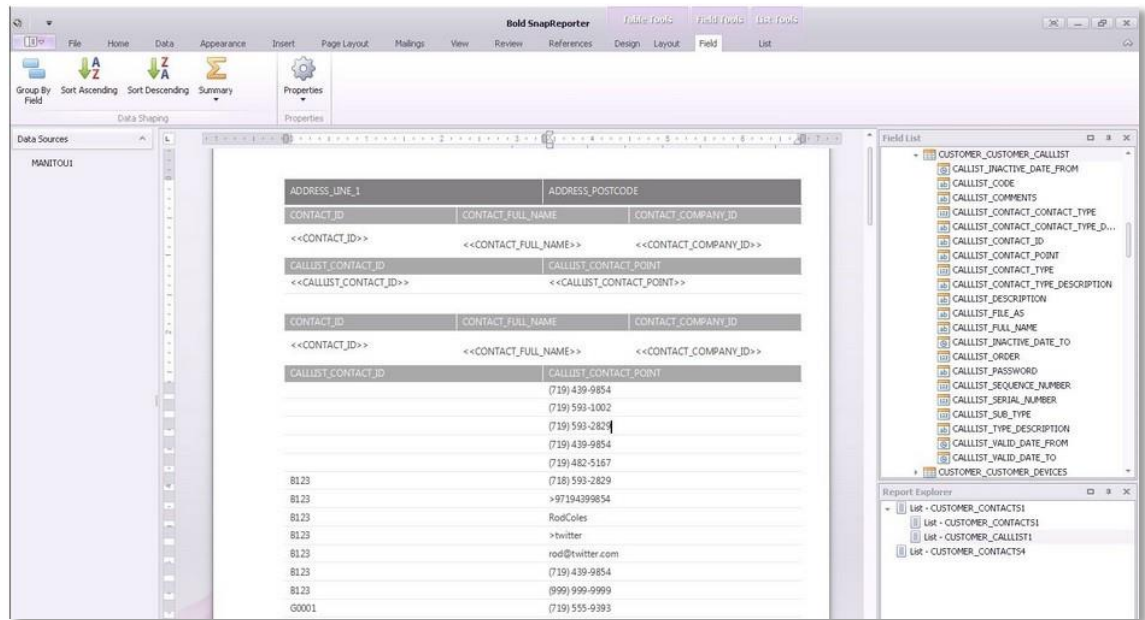
A standard Report consists of primary field types. These are the fields listed in the **Field list** that do not include additional sub-types.

1. Begin by identifying the criteria you want to include in your Report.
2. Next, select the field types from the **Field List** on the right side of your screen.

Note: We recommend that you add fields by pressing and holding down the **Ctrl** key while clicking on individual fields instead of individually dragging each field onto the Report surface.

3. While still holding down the **Ctrl** and mouse button, drag the field types onto the Report editing surface.

The Report now auto-generates by placing the data into adjustable columns. Additionally, all fields you include in the Report will now also display in the **Report Explorer** list located just below the **Field List**.

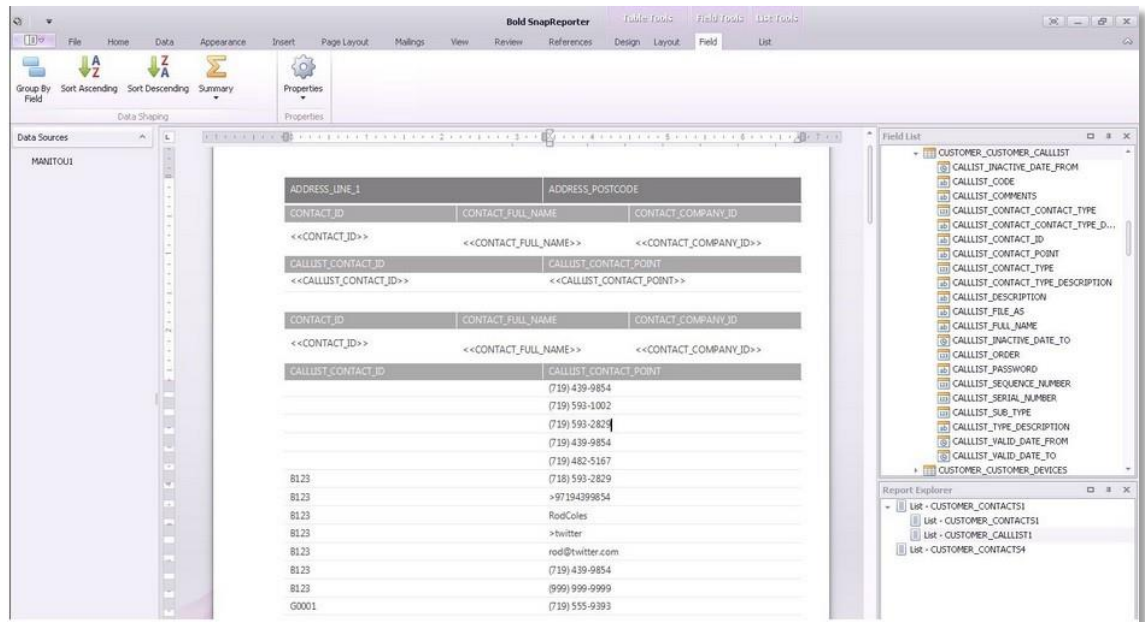


Create a Master Detail Report

A Master Detail Report consists of detailed information, including sub-types, within a particular field group. Field groups are those field types with drill-down selections of sub-types that are designated by arrows in the **Field List**.

1. Begin by identifying the criteria you want to include in your Report.
2. Select the field types from the **Field List** on the right side of your screen.

Note: We recommend that you add fields by pressing and holding down the **Ctrl** key while clicking on specific fields instead of individually dragging each field onto the Report surface.
3. Once you have selected the heading field types, expand any additional field groups and select the field sub-types you want to include.
4. While still holding down the **Ctrl** and mouse button, drag the selected field types and sub-types onto the Report editing surface.
5. The Report now auto-generates by placing the requested data into easily adjustable tables of data. Additionally, all fields included in the Report now also display in the **Report Explorer** list located just below the **Field List**.



For additional information on how to customize and edit your Reports, please refer to one of the following sections:

- [Editing a Report](#)
- [Managing Data](#)
- [Saving and Distributing a Report](#)

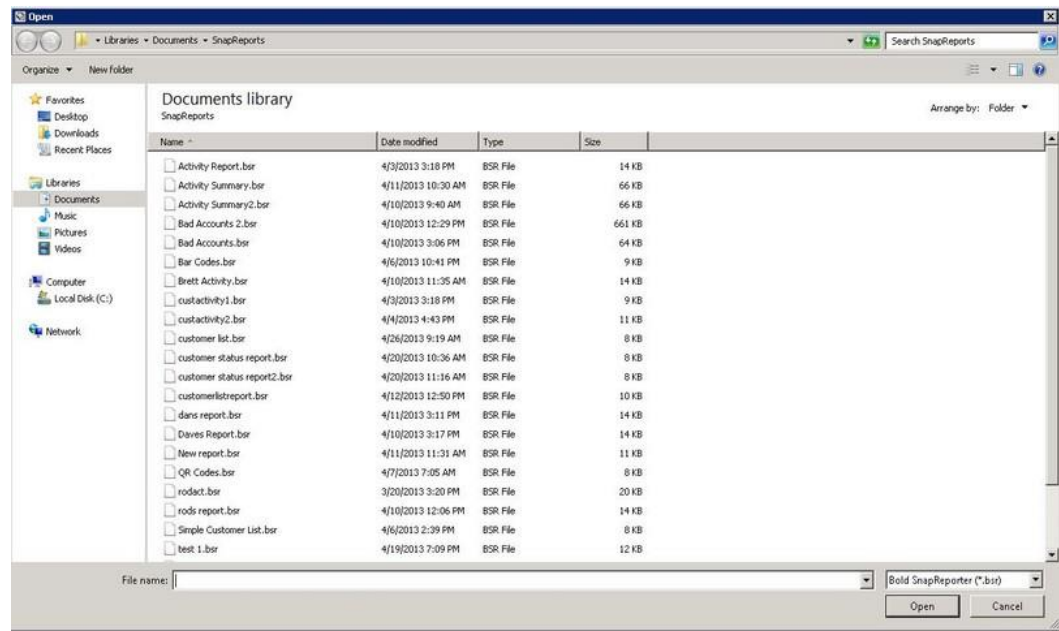
Open an Existing Report

Opening an existing SnapReporter Report only requires browsing to the appropriate folder.

1. Navigate to the **File** tab on the main toolbar, and then click **Open**.

Note: If the buttons on the **File** tab are not activated, click the Data Source to enable it.

2. Browse to the SnapReporter folder that contains existing **.bsr** Report files, or select another file location.



3. Select the appropriate Report by clicking to highlight the Report name, and then click **Open**.

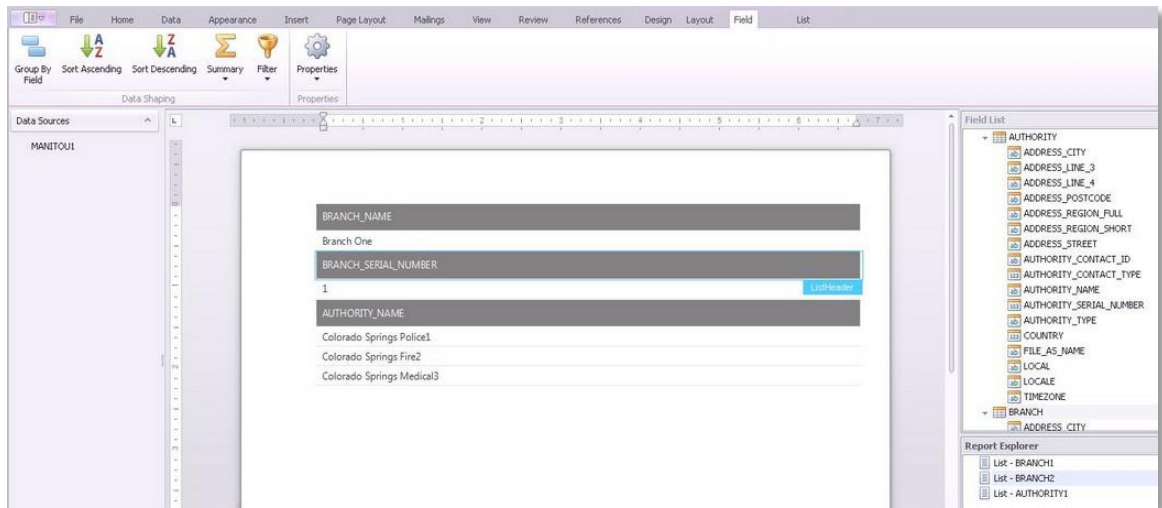
The Report opens onto the Report editing surface with SnapReporter.

Editing a Report

Just like with word processing tools, SnapReporter provides quick and easy ways to adjust layout and design.

Moving from Field to Field

Jump from section to section within a multiple-field Report by clicking on the list titles within the **Report Explorer** panel on the right side of your screen. Once clicked, the Report will jump to that specific section and highlight the list header.



Adding and Removing Fields and Columns in a Standard Report

Fields may be added or removed easily from a generated Report. Adding a field may be done by either first adding a column or by dragging and dropping the field type directly into place on the Report.

Add a Column

1. Click in an existing column where you want to add a new column.
2. Right-click and select **Split Cells**.
3. Right-click again and select either **Insert Columns to the Left** or **Insert Columns to the Right** of the current cursor position.
4. Once added, select the field you want to add and drag it into the blank column.

Drag and Drop a Field Type

Additionally, you can drag and drop fields onto your Report.

1. Locate the field you want from the **Field List**.
2. Click and drag the field to the Report, positioning the cursor where you want the field to display.
3. When the blue line displays, release the mouse button to drop the data into place.

Remove a Column

1. Click within the column of data you want to remove.
2. Right-click and select **Delete Cells**, and then select **Delete entire column**.

3. Click **OK** at the confirmation prompt.
4. Additionally, if you place a field in error, use the **Undo** button from the **File** menu to reverse the action.

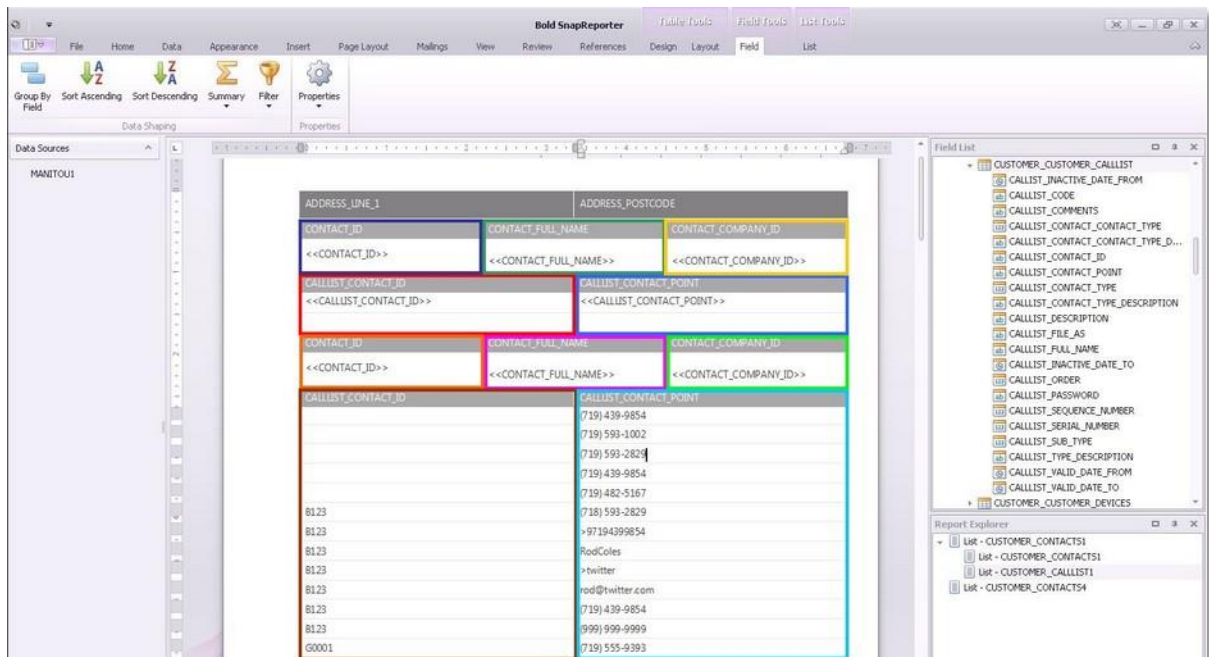
Adding and Removing Fields and Columns in a Master Detail Report

As above, you can add and remove columns by right-clicking and then selecting the appropriate action. With column-rich Master Detail Reports, it may be easier to remove particular cells.

1. To remove a cell, position the cursor on the field cell you want to delete and right-click.
2. Select **Delete Cells**, and then choose a delete option (**Shift cells left**, **Shift cells up**, **Delete entire row**, or **Delete entire column**).
3. Click **OK**.

Additionally, you can drag and drop field types into place, ensuring that the blue line displays where you want to position the information.

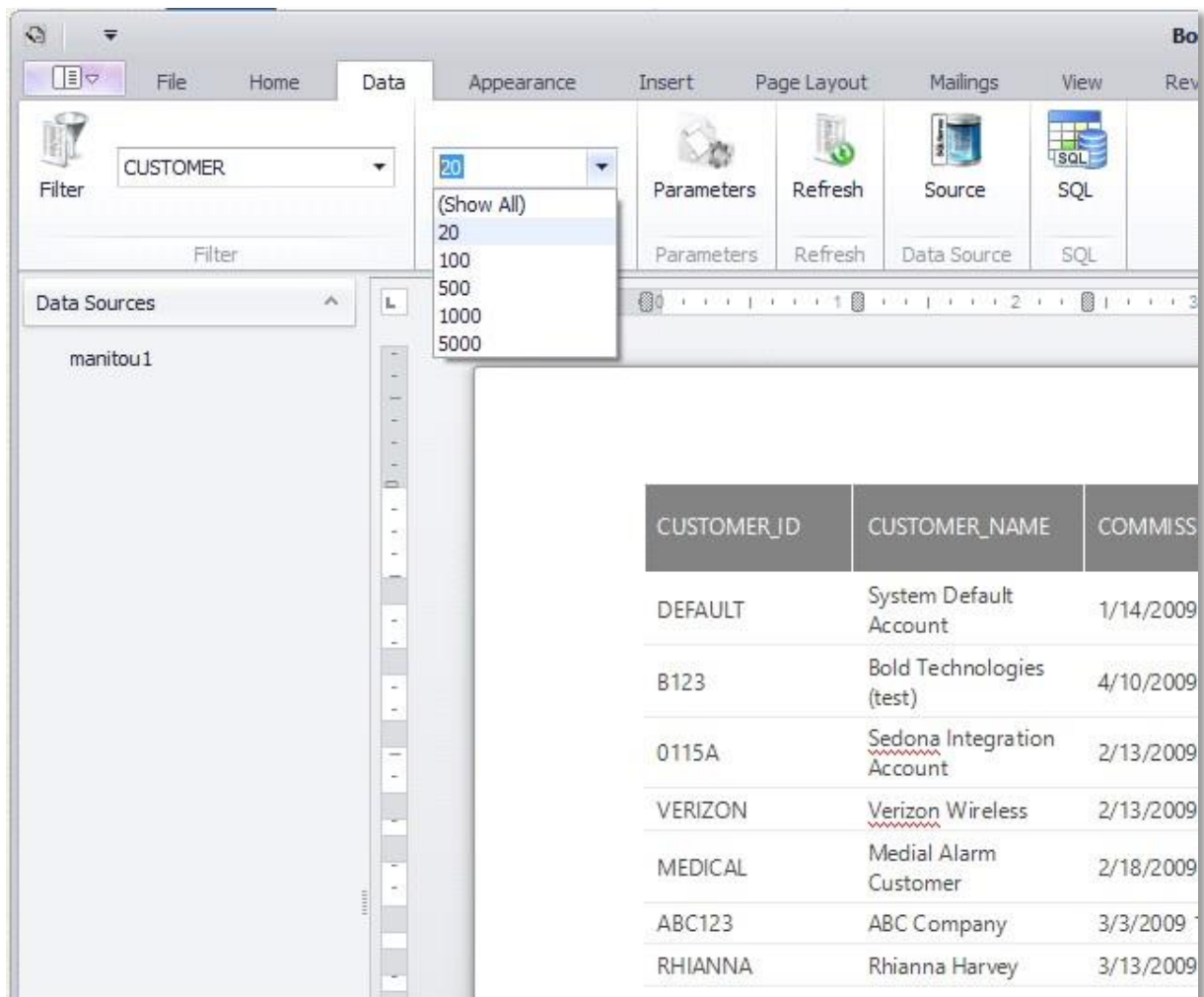
Pay close attention to the top of the column when dealing with Master Detail Reports. Columns begin and end at various locations within a Master Detail Report. In the example below, each highlighted box denotes a different column. With so many columns available, you can see why it is important to determine exactly where you want each column to display when you are adding or removing fields.



Adjusting the Number of Data Rows

You can limit the number of rows that display in your SnapReporter Report. To increase performance, SnapReporter limits incoming data to only 20 records by default. Therefore, all the Report data only displays to the user when in Print Preview. However, you can define the number of records that display, as well as eliminate the limit entirely. See [Print or Export Your Snap Report](#).

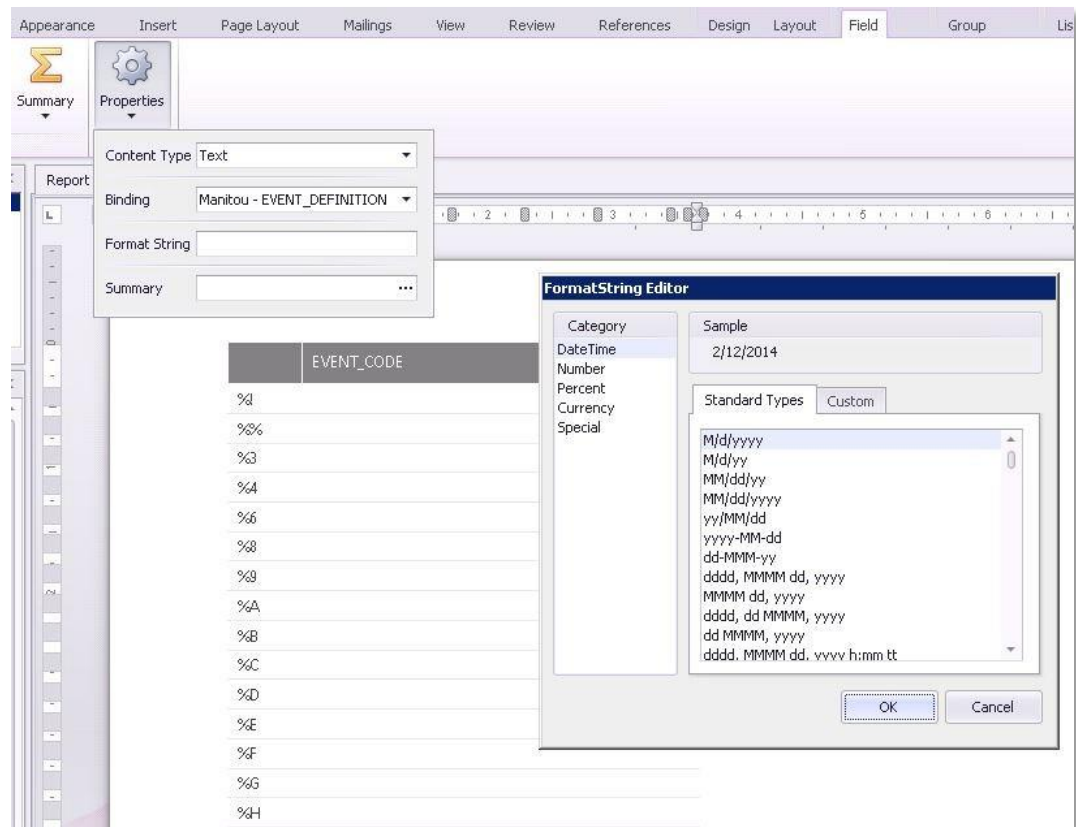
To specify a row limit for your Report, click a field from the **Field List** to select it. Then on the **Data** tab of the main toolbar, select the number of data rows on the **Row Limit** drop-down list menu.



Note: The **Row Limit** setting does not affect the number of records that display in Print Preview (which always displays all available records). See [Print or Export Your Snap Report](#).

Applying a Date Format

1. To provide a date format to a date-related column (such as **Commission Date**), select any field in this column to activate the **Field** menu in the main toolbar.
2. In the **Field** menu, click **Properties** and select **FormatString** from the drop-down list by clicking the **Ellipsis** button.
3. In the **FormatString Editor** window, select the format you want and then click **OK**. An example of the selected date format shows in the **Sample** box above the formatting options.



4. To apply this change to all fields in the column, click within another row.

Adjusting Tables, Columns, and Rows

You can easily resize column width by placing the cursor on the line in between two columns, and using click-and-drag to adjust the width. Do the same to adjust row height.

Many actions are available to edit rows and columns – such as add a column/row, borders and shading, etc. – within the **Table Tools** Design and Layout menus. See [Chart Tools – Design Tab](#) and [Table Tools – Layout Tab](#).

Apply changes and edits to an entire Report by editing the top cell of a column or table, and then clicking elsewhere in the Report.

Example: Let's say you create a Master Detail Report with numerous tables separating Customers and their related contact information. You need to add a space to adjust the contact name. Click in the first contact name cell in the top table. Press **Enter** to create a one line space above the contact name. To apply the change to all contact name cells in all tables of the document, click any other cell in the Report and it will automatically update.

Arranging Content

Moving Data

1. If you need to adjust existing data, make adjustments to the top-most field. If a field is not in the position you want, move the data from one column to another rather than trying to move the headers.
2. Click and drag the field to where you want it. All related fields will self-adjust to the same location.
3. Retype the headers.

Swapping Data

1. To swap data in two different fields, cut the data in the first field using the **Cut** command.
2. Drag the data in the second field to the location of the first field.
3. Paste the information copied to the clipboard into the now empty second field location.

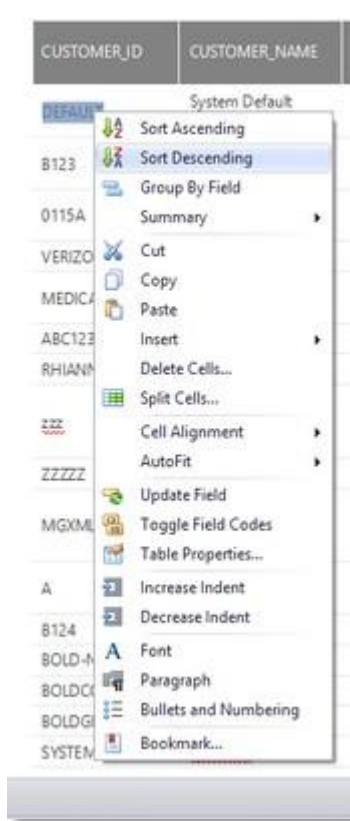
Managing Data

There are several ways to manipulate the data you want to include and display in your Report.

Sorting Data

You can sort data using either the ribbon panel or context menu.

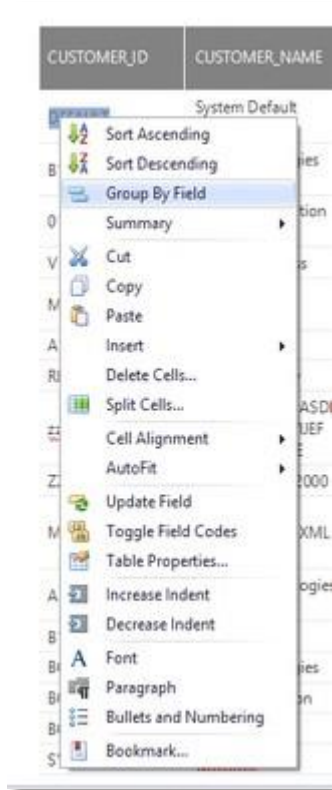
To sort using the context menu: right-click the field you need to sort, and click **Sort Ascending** or **Sort Descending**.



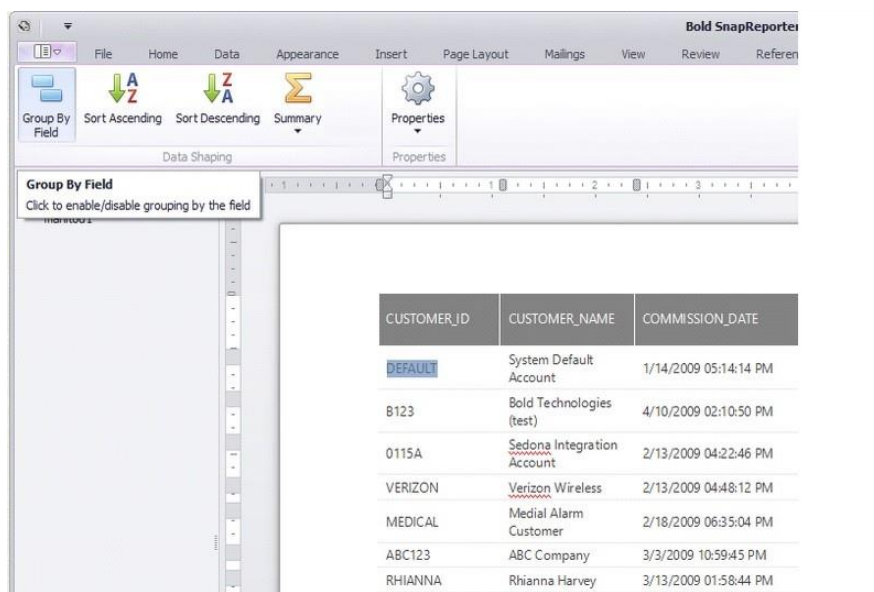
To sort from the **Field** menu: select the **Field** tab from the main menu, and select **Sort Ascending** or **Sort Descending**.

Grouping Data

To group using the context menu: right-click the field you need to group, and click **Sort Ascending** or **Sort Descending**.



To group from the **Field** ribbon menu: select the **Field** tab from the main menu, and choose **Group By Field**.



Note: Grouping fields activates the **Group** menu on the main toolbar. For more information about tools available in the **Group** menu. See

Managing Grouped Headers and Footers

SnapReporter allows you to use headers and footers for groups. For a newly created group, only the group header is added by default.

To manage the availability of group headers and footers (for example, to include a group footer in your Report, or to remove the header and footer completely) click a field to select it, and then click the **List** tab in the main toolbar.

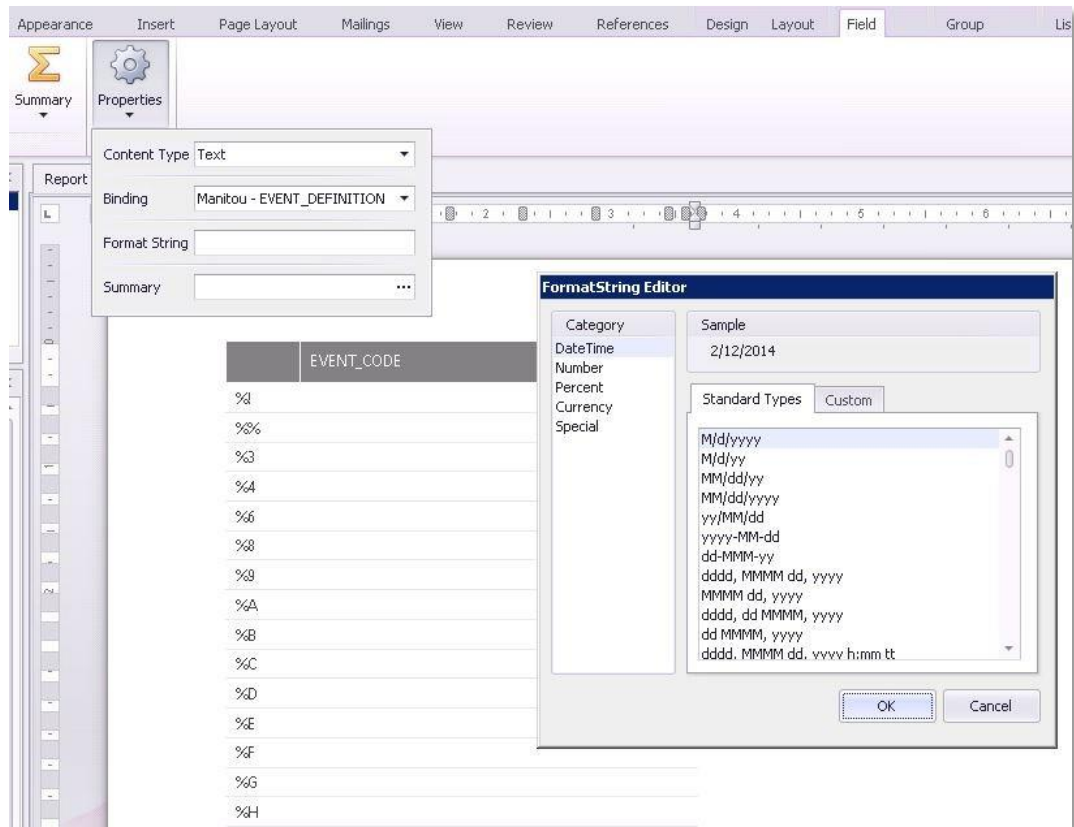
Select **Header** or **Footer**. Then, select the **Add** or **Remove** command.



Formatting Data

You can format cells in data columns by date/time, number, percent, currency, and special categories.

1. Open your SnapReporter Report.
2. Select the field you want to format.
3. In the activated **Field** tab, click the **Properties** button.
4. From the list of options, click the **Ellipsis** button at the right edge of the **FormatString** field.
5. In the **FormatString Editor** box, specify **Category** and **Standard Types**.
6. Click **OK**. To apply the changes to all fields in the column, click any other field cell in your Report.



Customizing a Report

Adding Graphics

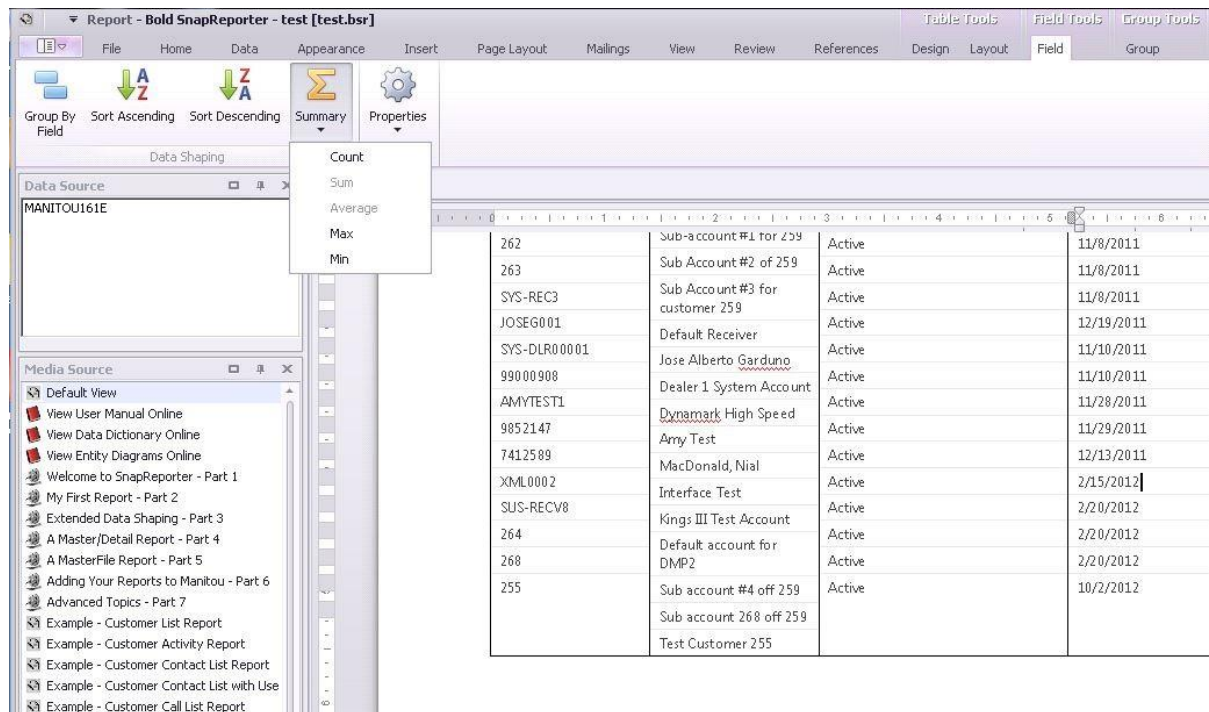
Adding graphics to a SnapReporter Report is easy, but it increases the file size so that the system might limit your ability to distribute your Report electronically. For this reason, we recommend limiting your use of added graphics.

1. With your Report open, position the cursor at the location you want to insert the graphic.
2. Click **Insert**, and then click **Picture**.
3. Browse to and select the graphic you want to add.
4. Click **OK**.

Calculating a Summary Function

If you want to view totals for specific numerical data, you can apply a summary function to your Report. Summary functions can be used to determine the count, sum, average, minimum, or maximum of numerical-based fields.

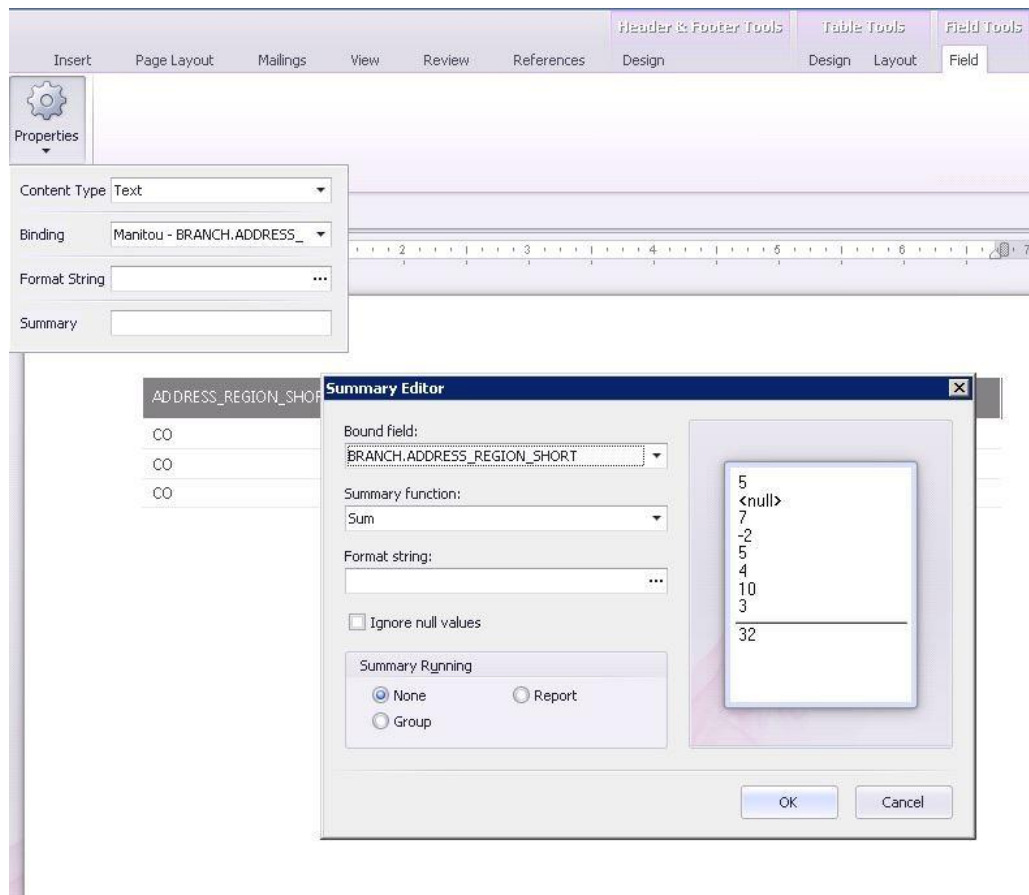
1. Open your SnapReporter Report.
2. Select the field where you want to apply the summary function.
3. In the activated **Field** tab, click the **Summary** button, then select the summary function you want to add.



Summary Function Customization

In addition to the standard summary functions available, you can customize summary functions by using the **Summary Editor** window.

1. Click the field to which you want to add the summary function.
2. Click the **Field** tab, and then click **Properties**.
3. Click the **Summary** field Ellipsis to display the **Summary Editor** window.



4. Create the summary function you want, and then click **OK**.

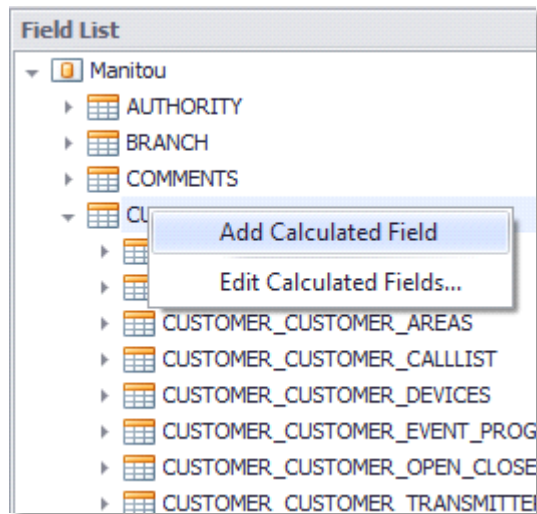
Note: To learn how you can apply currency and date time formatting to fields in your SnapReporter Reports, see [Applying a Date Format](#).

Applying a Calculated Field

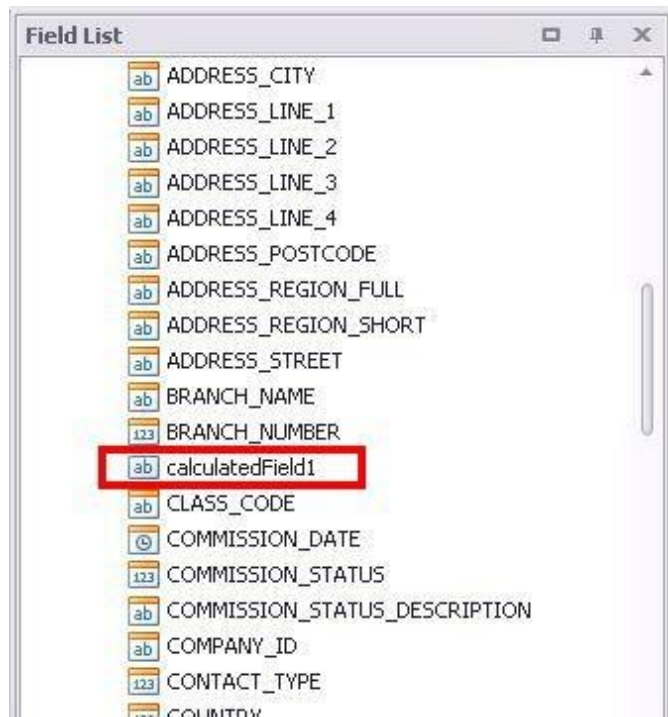
To calculate the product of two fields in a Report, you must create and add a calculated field.

Create a Calculated Field

1. Open an existing SnapReporter Report, or create a new one.
2. Right-click on any field type in the **Field List** window to create a calculated field, then choose **Add Calculated Field**.

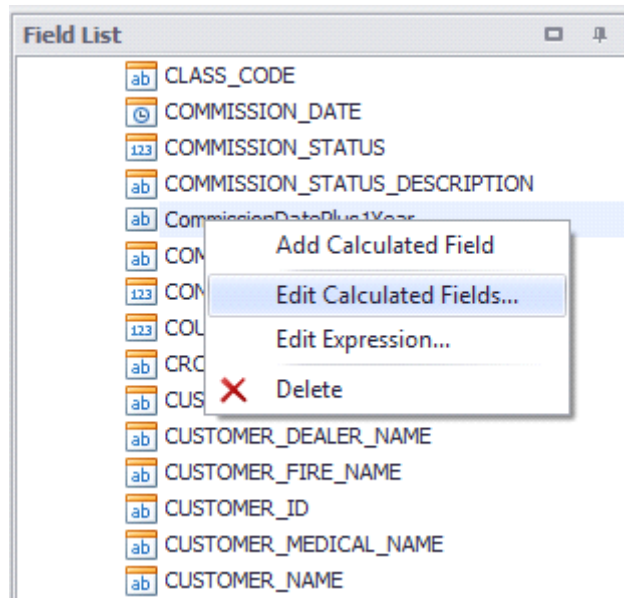


The calculated field you created now displays in the **Field List**.

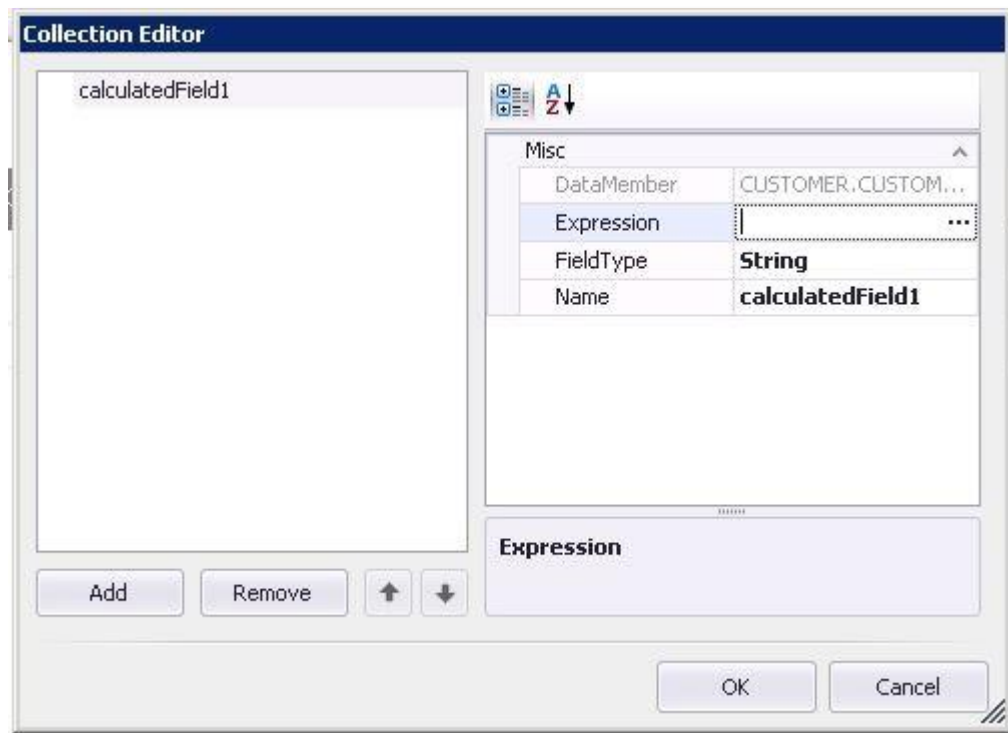


Note: Please note that the **Field List** displays fields in alphabetical order.

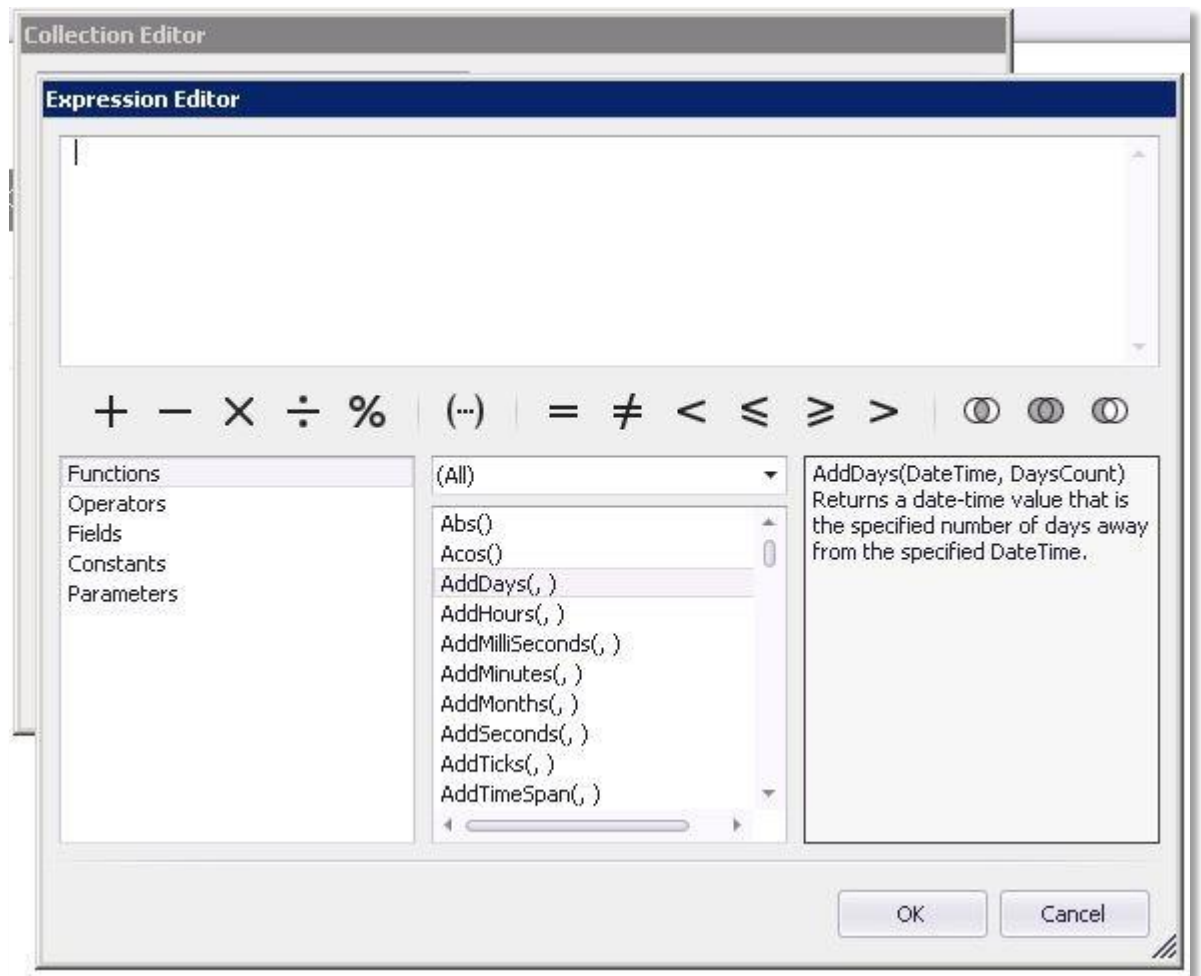
3. Then, right-click the calculated field you created, and select **Edit Calculated Fields**



4. In the **Collection Editor** window, click the **Ellipsis** button on the right edge of the **Expression** field.



5. Create your expression on the **Expression Editor** window, and click **OK**.



6. Click the **Ellipsis** button on the right edge of the **Field Type** field, and select the type of field you want to add.
7. Enter a name for your new calculated field in the **Name** field, and click **OK**.

Add a Calculated Field

Now, you can add the calculated field to your Report as you would a simple data field. Drag and drop the field where you want it in your Report.

The screenshot displays a report interface. On the left, a data table is shown with the following columns: CUSTOMER_ID, CUSTOMER_NAME, COMMISSION_DATE, COMMISSION_STATUS, and CommissionDatePlus1Year. The table contains several rows of data, including a row for 'Bold Technologies (test)' where the 'CommissionDatePlus1Year' field is highlighted in blue. On the right, a 'Report Explorer' panel is visible, listing various fields. The field 'CommissionDatePlus1Year' is highlighted in the list, indicating it has been selected for the report.

| CUSTOMER_ID | CUSTOMER_NAME | COMMISSION_DATE | COMMISSION_STATUS | CommissionDatePlus1Year |
|-------------|---|-----------------------|-------------------|-------------------------|
| DEFAULT | System Default Account | 1/14/2009 05:14:14 PM | 1 | 1/14/2010 5:14:14 PM |
| 8123 | Bold Technologies (test) | 4/10/2009 02:10:50 PM | 1 | 4/10/2010 2:10:50 PM |
| 0115A | Sedona Integration Account | 2/13/2009 04:22:46 PM | 1 | 2/13/2010 4:22:46 PM |
| VERIZON | Verizon Wireless | 2/13/2009 04:48:12 PM | 1 | 2/13/2010 4:48:12 PM |
| MEDICAL | Medial Alarm Customer | 2/18/2009 06:35:04 PM | 1 | 2/18/2010 6:35:04 PM |
| ABC123 | ABC Company | 3/3/2009 10:59:45 PM | 1 | 3/3/2010 10:59:45 PM |
| RHIANNA | Rhianna Harvey | 3/13/2009 01:58:44 PM | 1 | 3/13/2010 1:58:44 PM |
| zzz | New Customer ASDF ASLDFJWLE LWJEF LSI WELIFJ LWIE | 4/8/2009 08:45:32 PM | 1 | 4/8/2010 8:45:32 PM |
| ZZZZZ | Default for OH2000 | 5/7/2009 05:48:26 PM | 1 | 5/7/2010 5:48:26 PM |
| | Default for | | | |

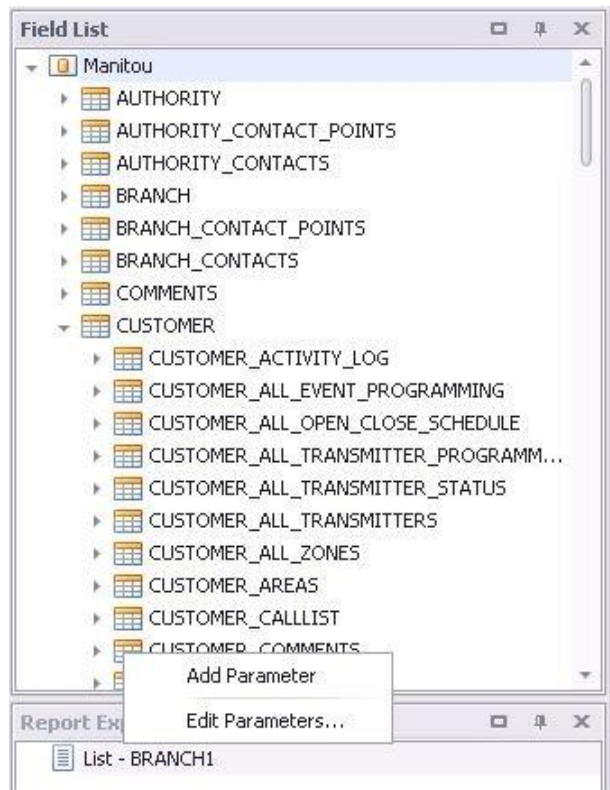
Report Explorer

- ADDRESS_STREET
- BRANCH_NAME
- BRANCH_NUMBER
- CLASS_CODE
- COMMISSION_DATE
- COMMISSION_STATUS
- COMMISSION_STATUS_DESCRIP
- CommissionDatePlus1Year
- COMPANY_ID
- CONTACT_TYPE
- COUNTRY
- CROSS_STREET
- CUSTOMER_BRANCH_NAME
- CUSTOMER_DEALER_NAME
- CUSTOMER_FIRE_NAME
- CUSTOMER_ID
- CUSTOMER_MEDICAL_NAME
- CUSTOMER_NAME
- CUSTOMER_POLICE_NAME
- DEALER_NAME
- DEALER_NUM

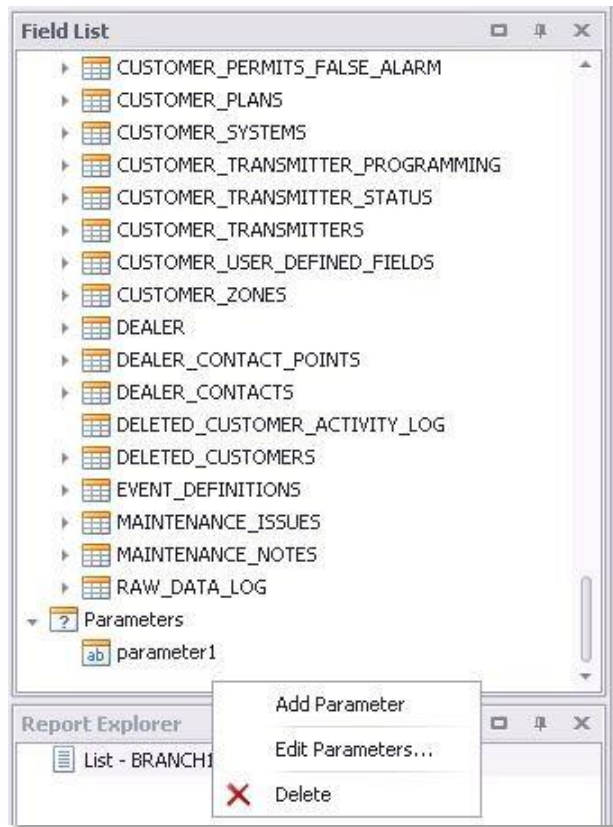
Passing Parameters to a Report

SnapReporter makes it easy to create a parameter (we are using a string parameter in this section's example) and apply it to your Report.

1. To create a parameter, switch to the **Field List** window, right-click the **Parameters** option (at the bottom of the list), and choose **Add Parameter**.

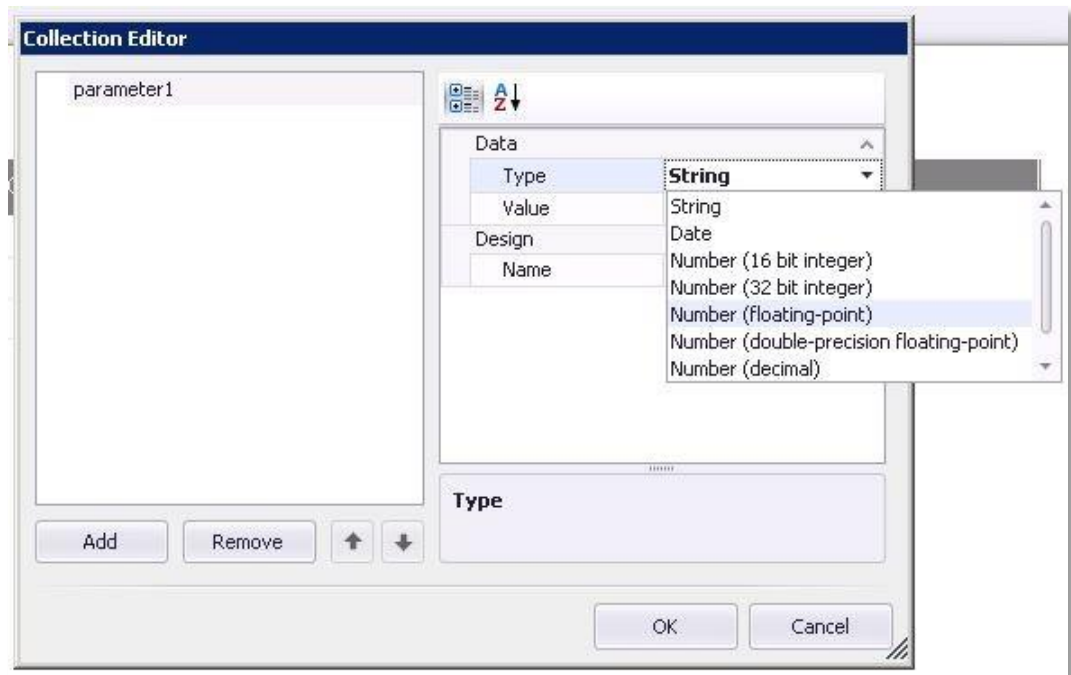


2. Right-click the parameter you just added, and select **Edit Parameters**.

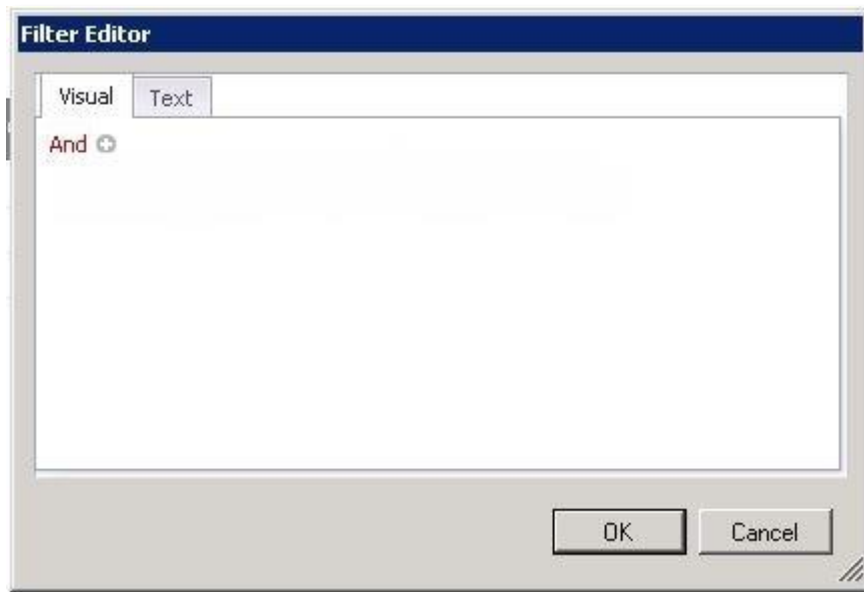


3. In the **Collection Editor** window, enter a parameter **Name**, and a default static **Value** for the parameter.
4. Click the **Ellipsis** button at the right edge of the **Type** field, and select the parameter type you want.

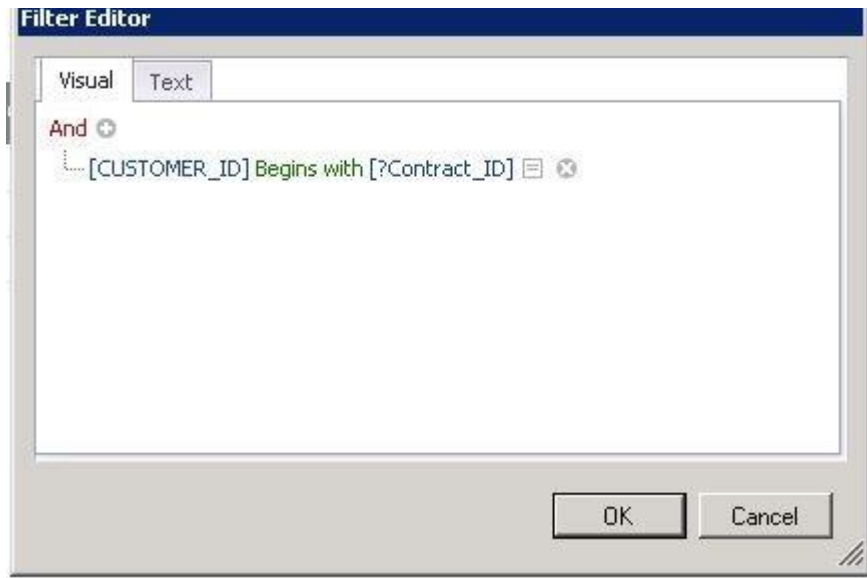
Note: This type corresponds to the value that a parameter can receive (for example, you cannot assign a string value to a numeric parameter).



5. Click **OK**.
6. Click the **Data** tab in the main toolbar, and then click **Filter**.
7. In the **Filter Expression** window, click the **+** to display the filtering expression options.

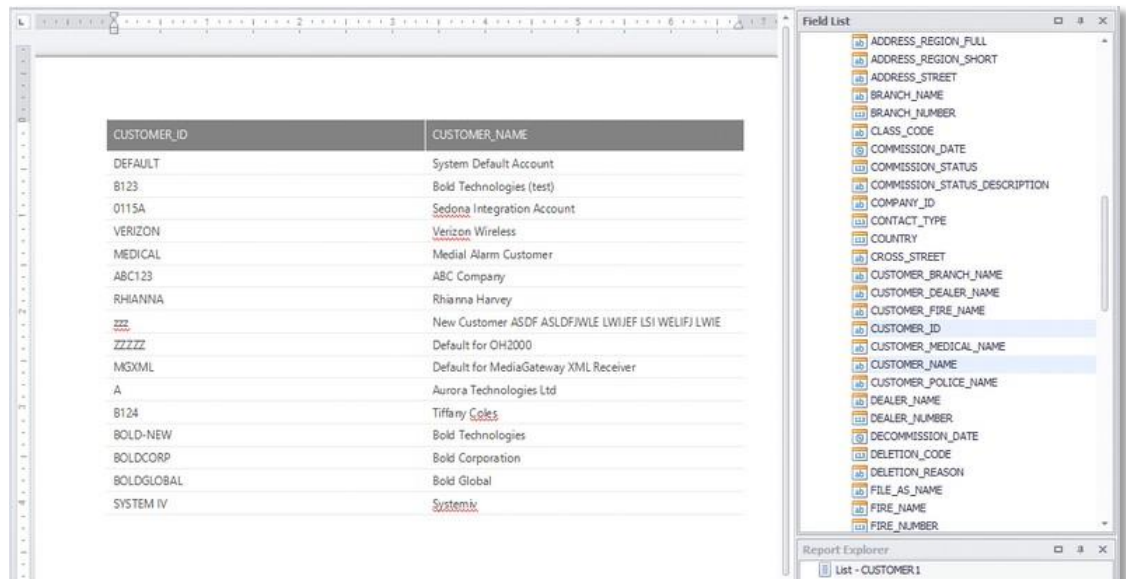


- Once the default filtering expression displays, click the links to display drop-down menus for each part of the filtering expression you want to create. (For the visual examples in this section, we are using the **CUSTOMER_ID** data field **Begins with the ?ContractID** parameter).



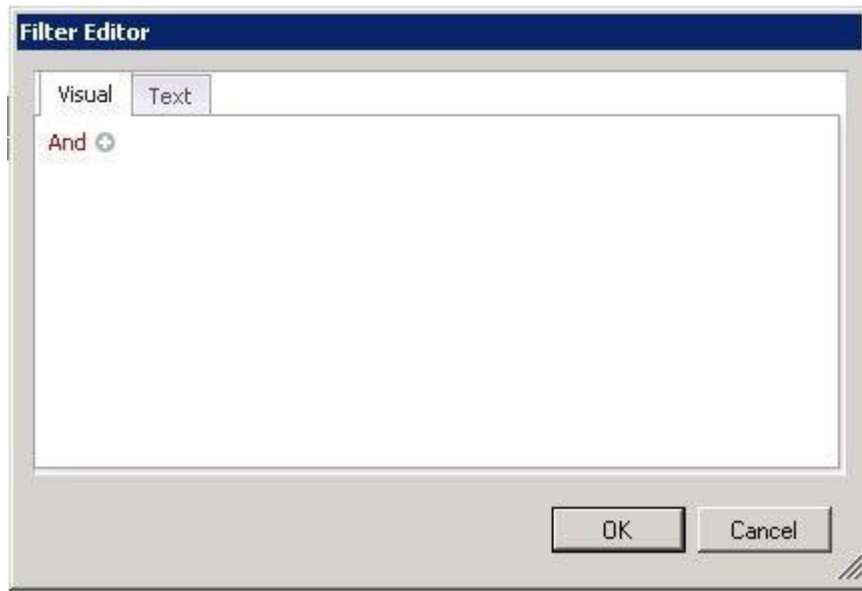
- Click **OK**, and then click **Save**.

You can now use the parameter when creating a Report just by dropping the related fields onto the Report editing surface. SnapReporter now filters the associated data based on the parameter values you specified.

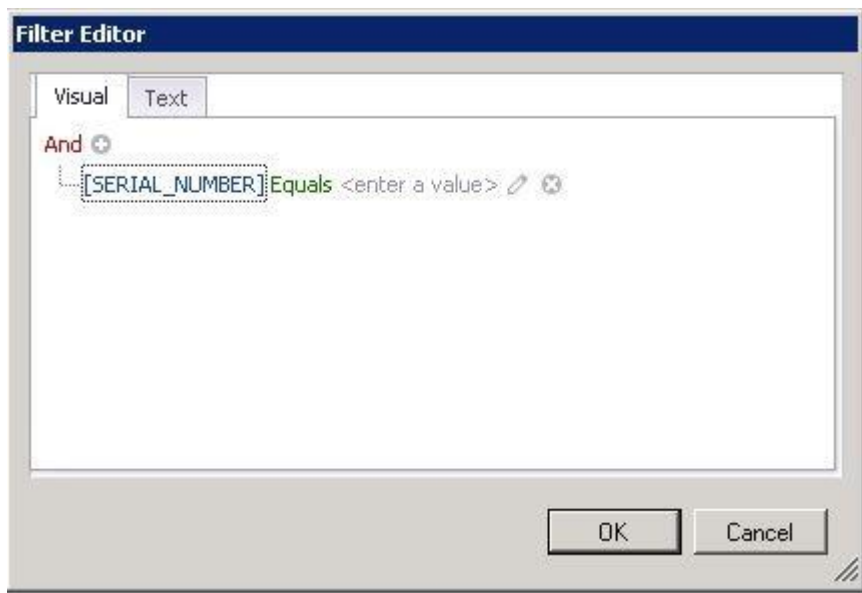


Adding a Date Range Parameter

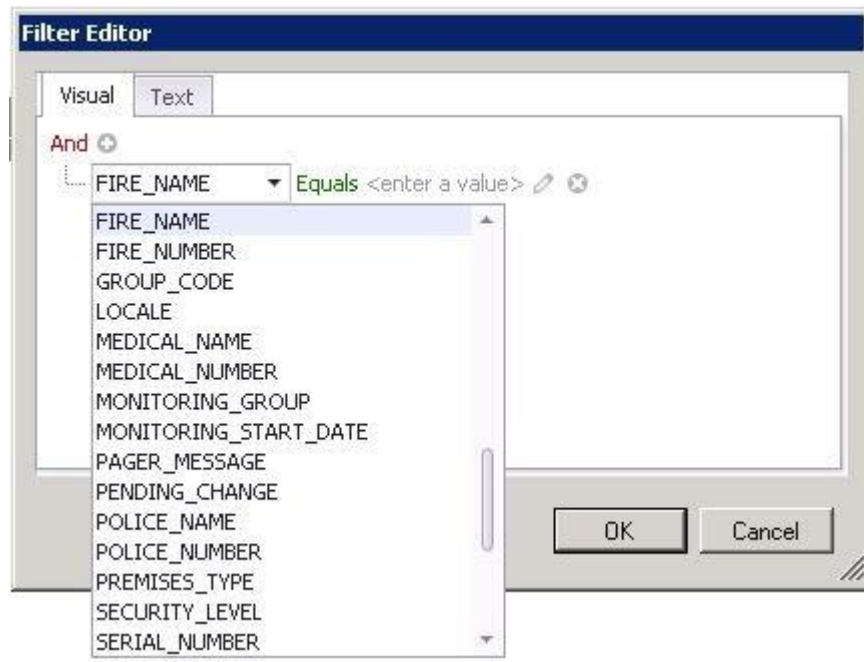
1. To add a date range parameter, open the **Data** menu and click **Filter**.



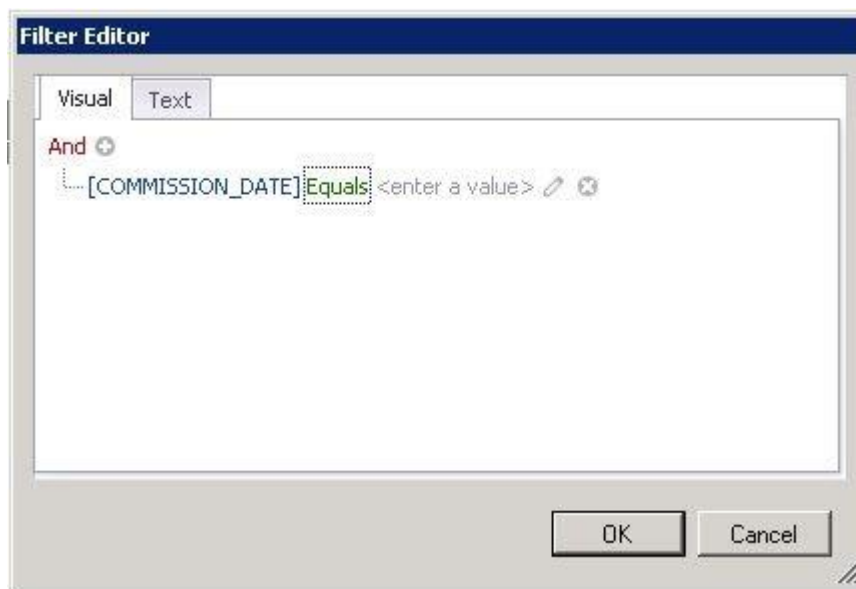
2. Click the + icon.



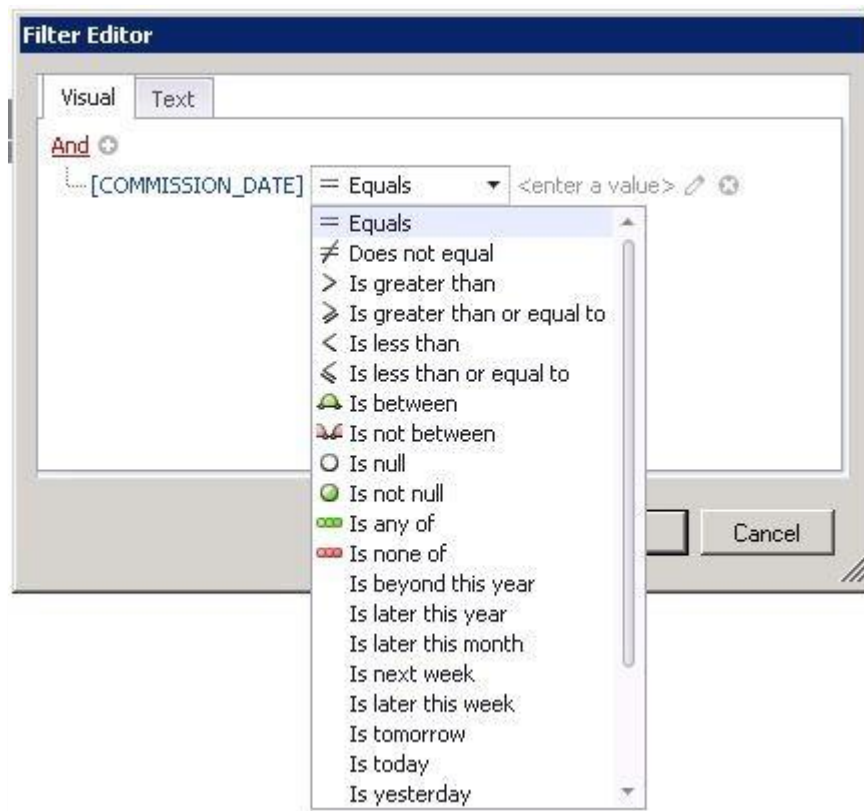
3. Click the link for the first field.



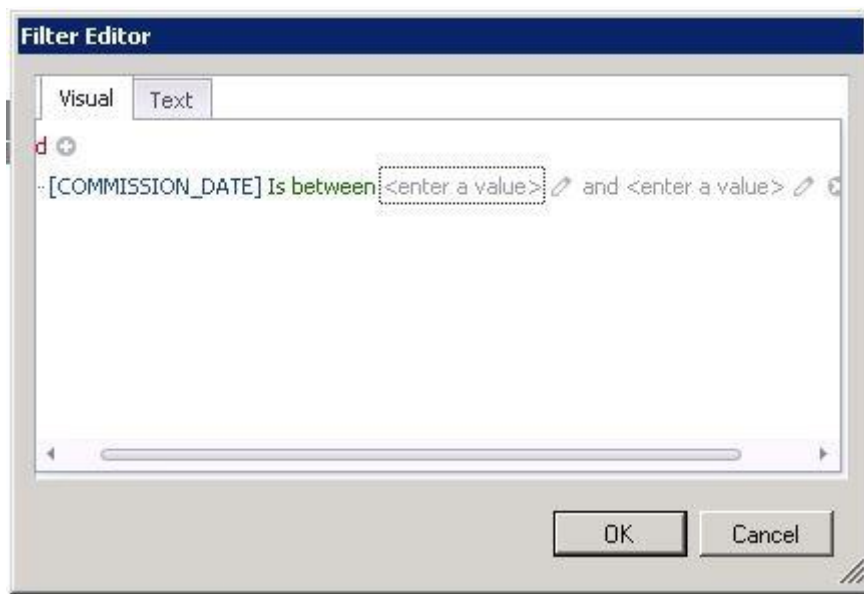
4. Select a date-specific field option from the dropdown list (for example, "Commission Date").



5. Click the **Equals** link.



6. Select the **Is between** option from the dropdown menu.



7. Enter a starting date in the first **<enter a value>** field and an ending date in the second **<enter a value field>**, and click **OK**.
8. Click **Save**.

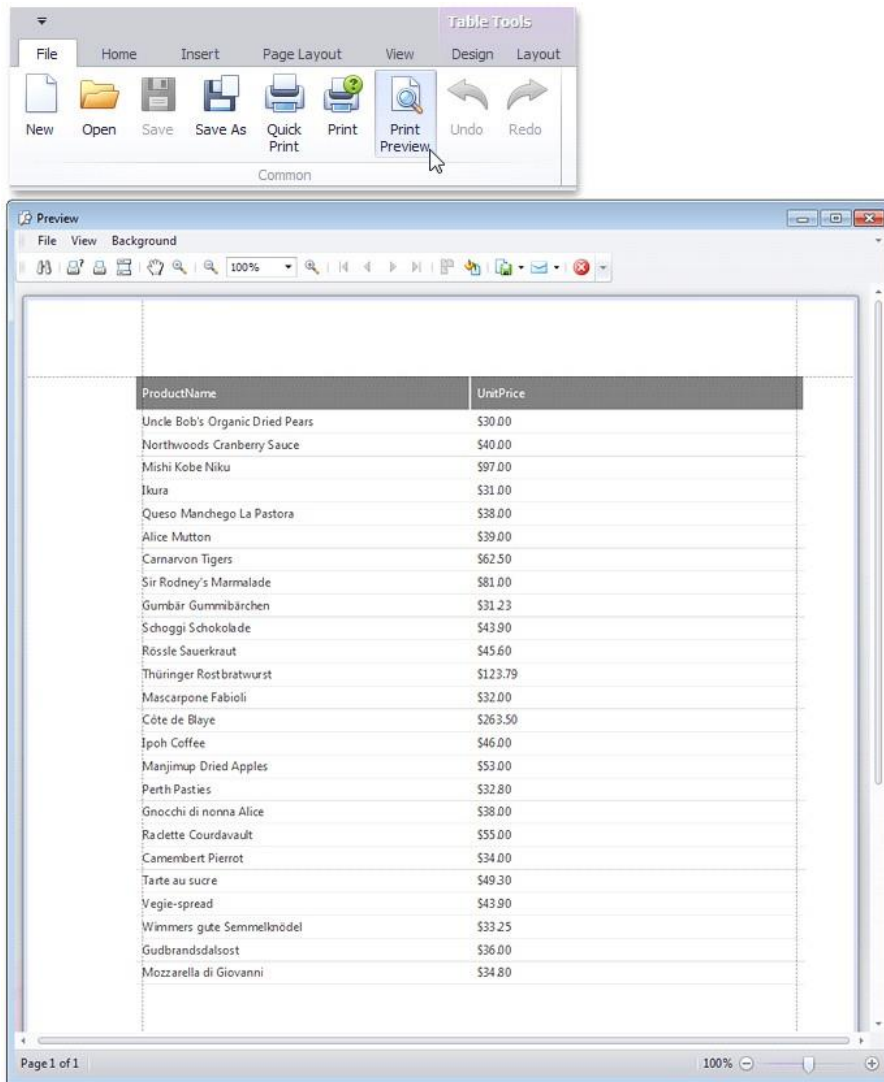
Now the Report you generate will only include dates in the range you set.

Note: All dates in Manitou are stored in a format that includes the date and time. Using the **Equals** date filtering option to set a date parameter is not generally effective because SnapReporter only shows results where the date in Manitou equals the specified date at 12:00am. Using the **Is between** date filter, you can select data for events that occurred between 12:00am on the first specified date and 12:00am on the second specified date.

However, selecting a date parameter of **Is Tomorrow**, **Is Today**, or **Is Yesterday** will work effectively and include all times during the specified day.

Previewing the Parameterized Report

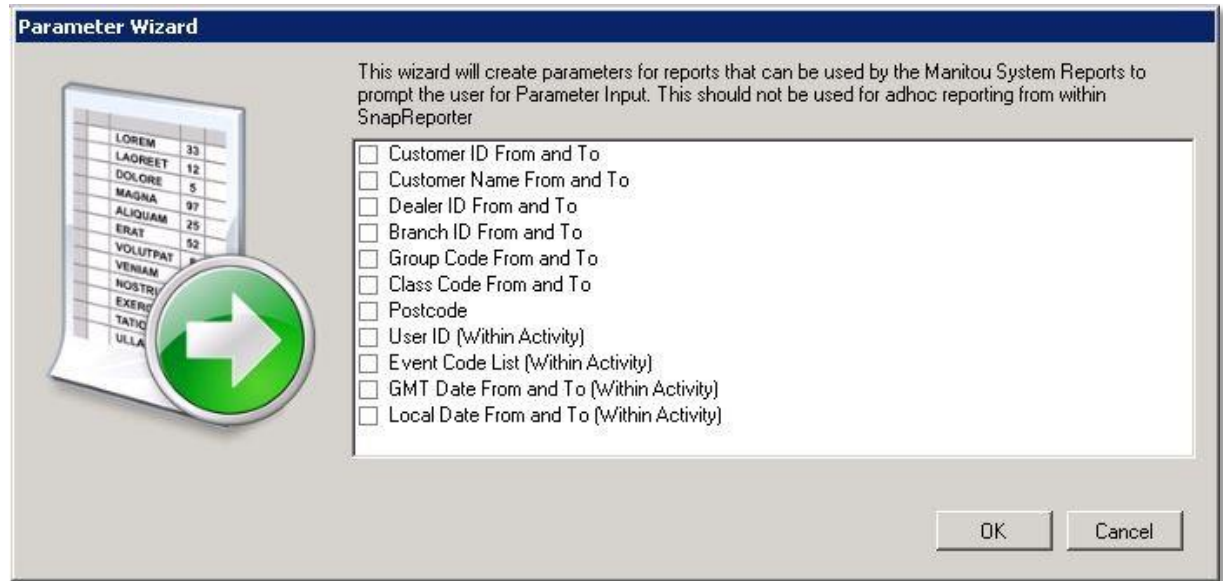
To view how your Report will look on paper, click the **File** menu in the main toolbar, and then click the **Print Preview**.



Importing Parameters into Manitou

SnapReporter has a number of quick ways to create parameters for Reports you want to import into Manitou.

1. Navigate to the **Data** menu, and then select **Parameters**.

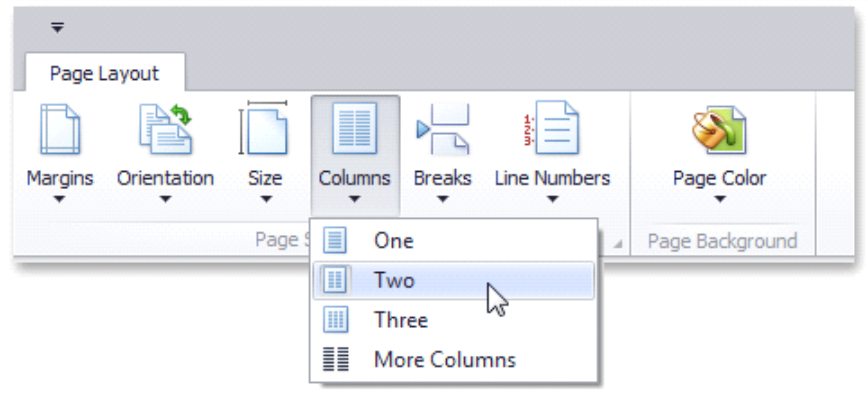


2. In the **Parameter Wizard**, select the parameters you want to apply to your imported Report, and click **OK**.
3. Save the Report, and import it into Manitou.

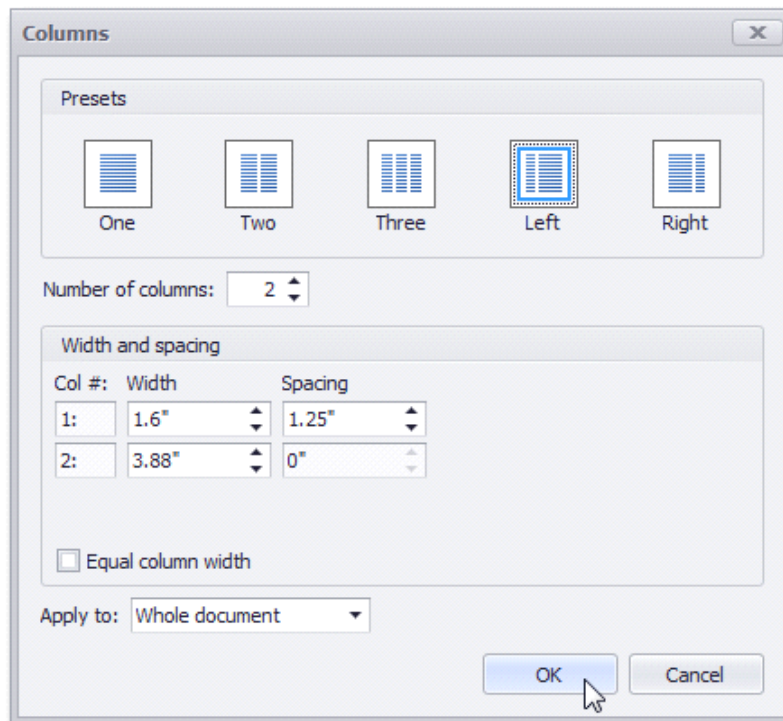
Note: To learn about importing a Report into Manitou, refer to [Saving and Distributing a Report](#).

Creating a Multi-Column Report

1. Open an existing Report or create a new one.
2. In the main toolbar, click the **Page Layout** tab.
3. Click **Columns**, and select the number of columns you want for your Report.



4. To define more than three columns, click **More Columns**. In the resulting **Columns** dialog, customize the Report layout you want. Click **OK** to apply.



The following image illustrates the result:

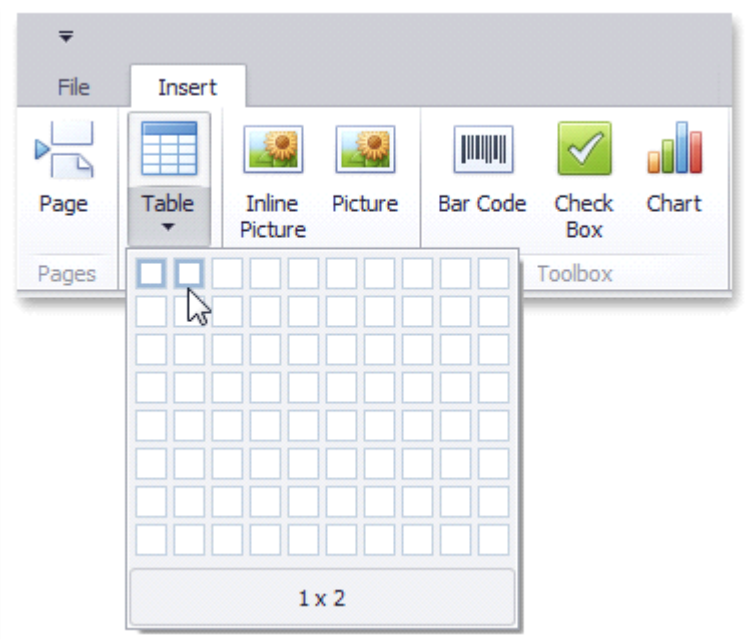
| | | |
|---|---|---|
| Alejandra Camino Spain Madrid Gran Vía, 1 28001 (91) 745 6200 | Ann Devon UK London 35 King George WX3 6FW (171) 555-0297 | Bernardo Batista Brazil Rio de Janeiro Rua da Panificadora, 12 02389-673 (21) 555-4252 |
| Alexander Feuer Germany Leipzig Heerstr. 22 04179 0342-023176 | Annette Roulet France Toulouse 1 rue Alsace-Lorraine 31000 61.77.61.10 | Carine Schmitt France Nantes 54, rue Royale 44000 40.32.21.21 |
| Ana Trujillo Mexico México D.F. Avda. de la Constitución 2222 05021 (5) 555-4729 | Antonio Moreno Mexico México D.F. Mataderos 2312 05023 (5) 555-3932 | Anabela Domingues Brazil São Paulo Av. Inês de Castro, 414 05634-030 (11) 555-2167 |

Creating a Side-by-Side Report

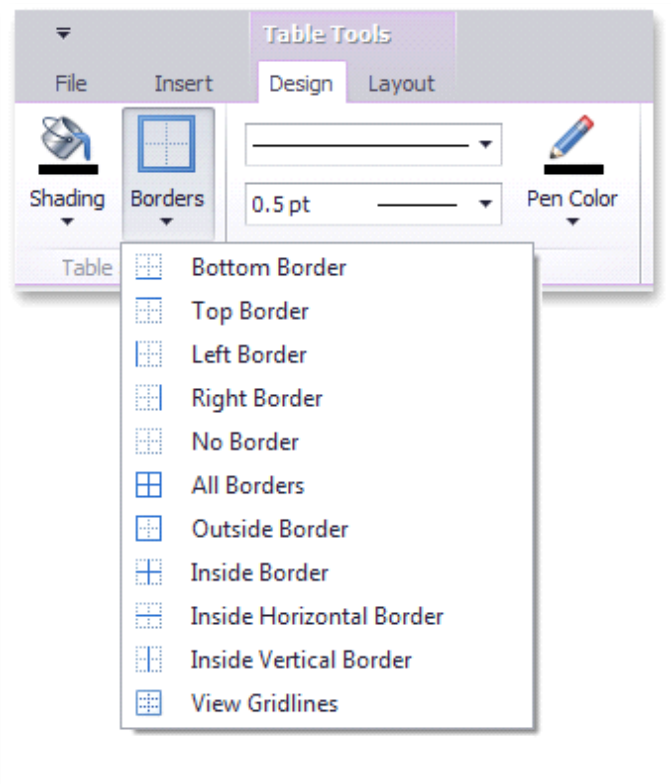
Side-by-side Reports can be helpful when you want to compare different types of data.

1. Open an existing Report, or create a new one.
2. To add a table to your Report, click the **Insert** tab on the main toolbar, and then click **Table**.
3. Move the cursor over the resulting grid to select the number of columns and rows you want. The table layout you selected displays at the bottom of the grid.

Note: In the example below, one row and two columns have been selected. This displays on the bottom of the grid as 1x2.

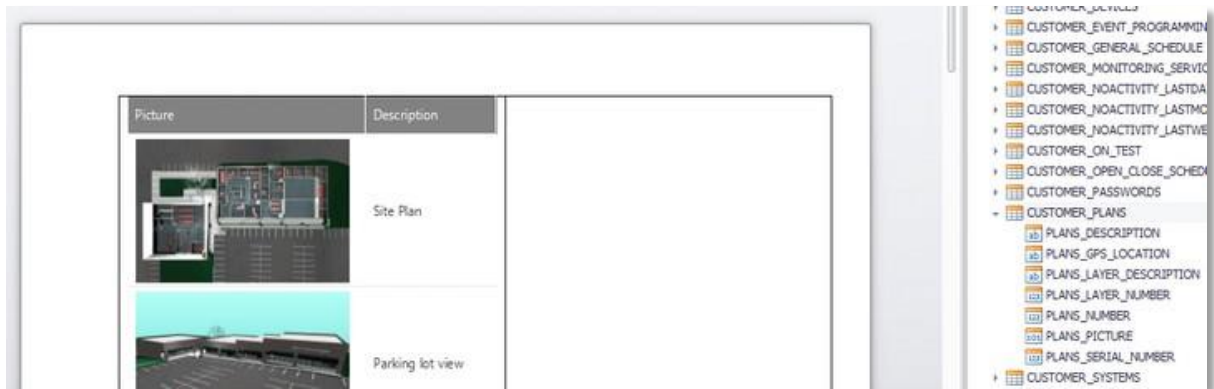


Additionally, you can set table borders by clicking **Borders** on the **Design** tab under **Table Tools**.



4. Once you have created the table, drop the appropriate fields from the **Field List** into the table's columns.

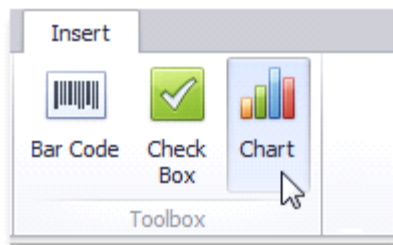
In the example below, we used the **CUSTOMER_PLANS.PLANS_PICTURE** and **CUSTOMER_PLANS.PLANS_LAYER_DESCRIPTION** fields to populate the table.



Adding a Chart to your Report

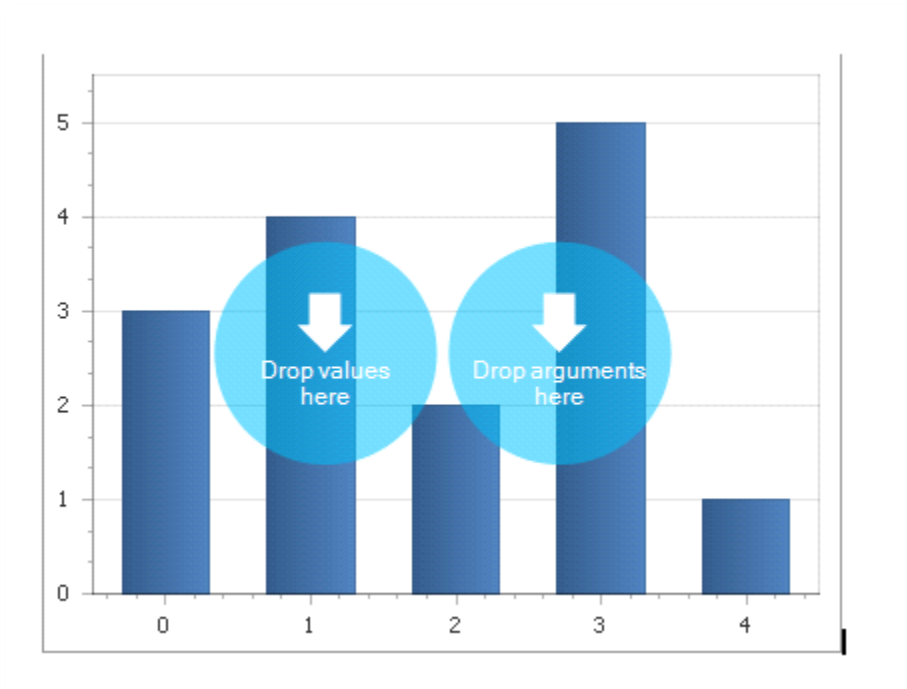
SnapReporter provides an easy way to create and customize your charts. If you need more complex chart options, SnapReporter also provides a Chart Wizard.

1. To add a chart to a Report, select **Chart** on the *Insert* tab of the main toolbar.



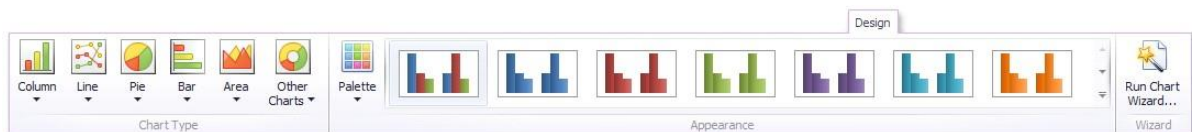
2. On the default chart that displays, the blue circles correspond to regions for values and arguments. From the **Field List** window, select and drop the correlating fields onto the chart values and arguments locations.

Note: In the example below, we are using the **EVENT_CODE** field for the values region and the **DATE_VALUE** field for the arguments region of the chart.

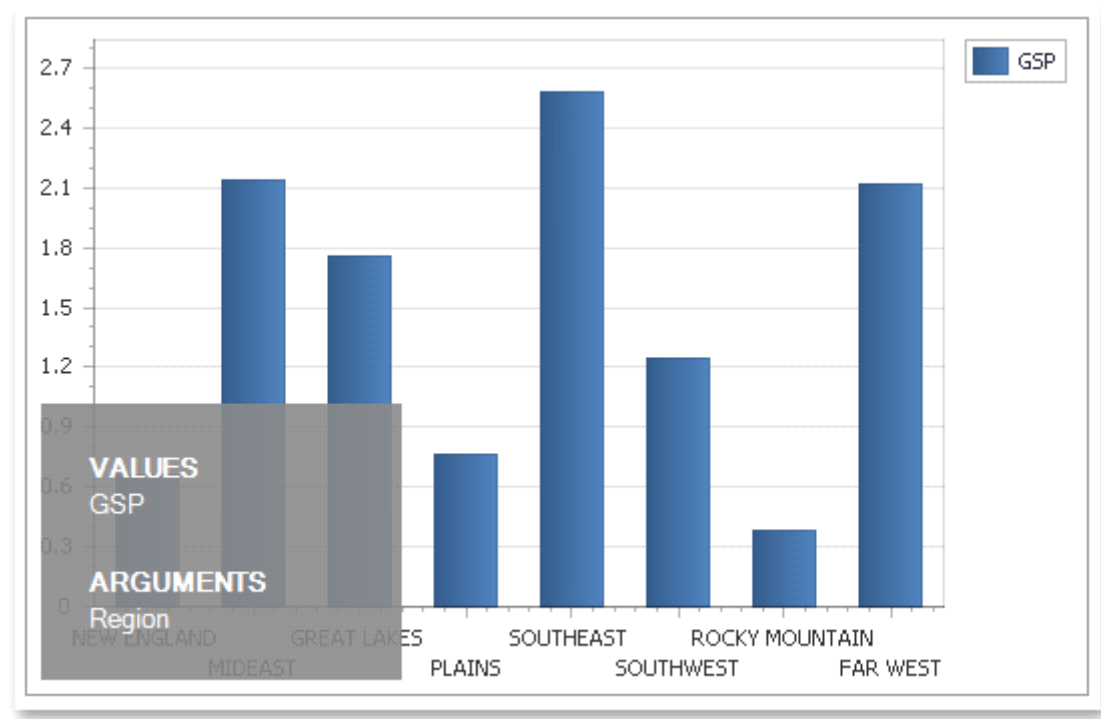


Changing Chart Type

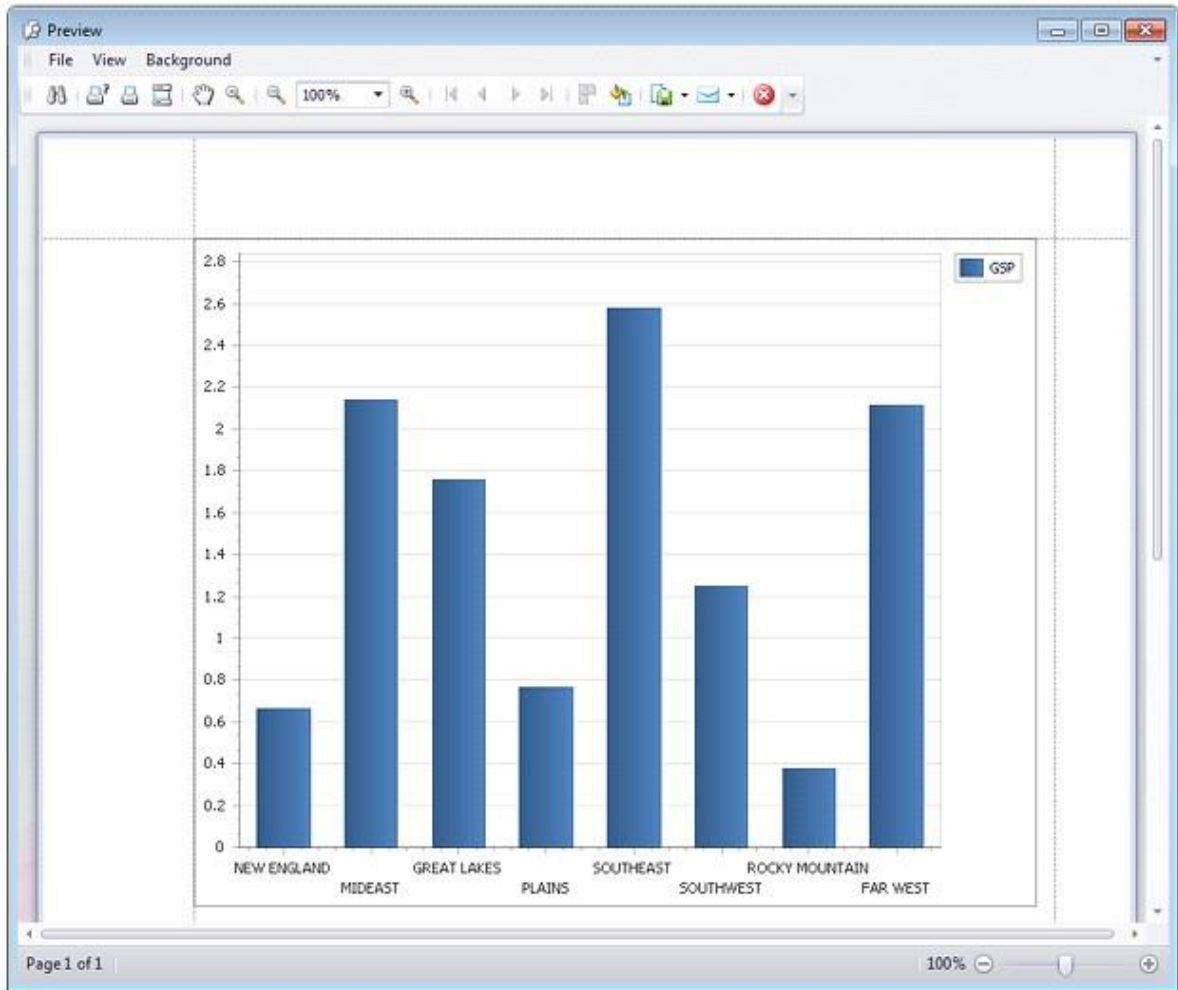
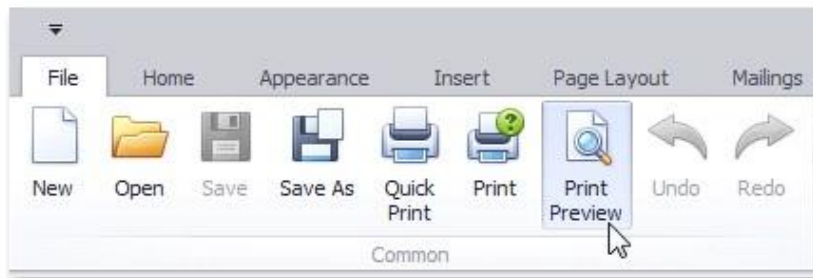
You can change the chart type by clicking on the chart and then selecting another chart type from the **Design** tab on the main toolbar. You can adjust the chart's palette and appearance on the **Design** tab, as well.



Your chart is now ready.



To view how your chart will look on paper, click **Print Preview** on the **File** menu.

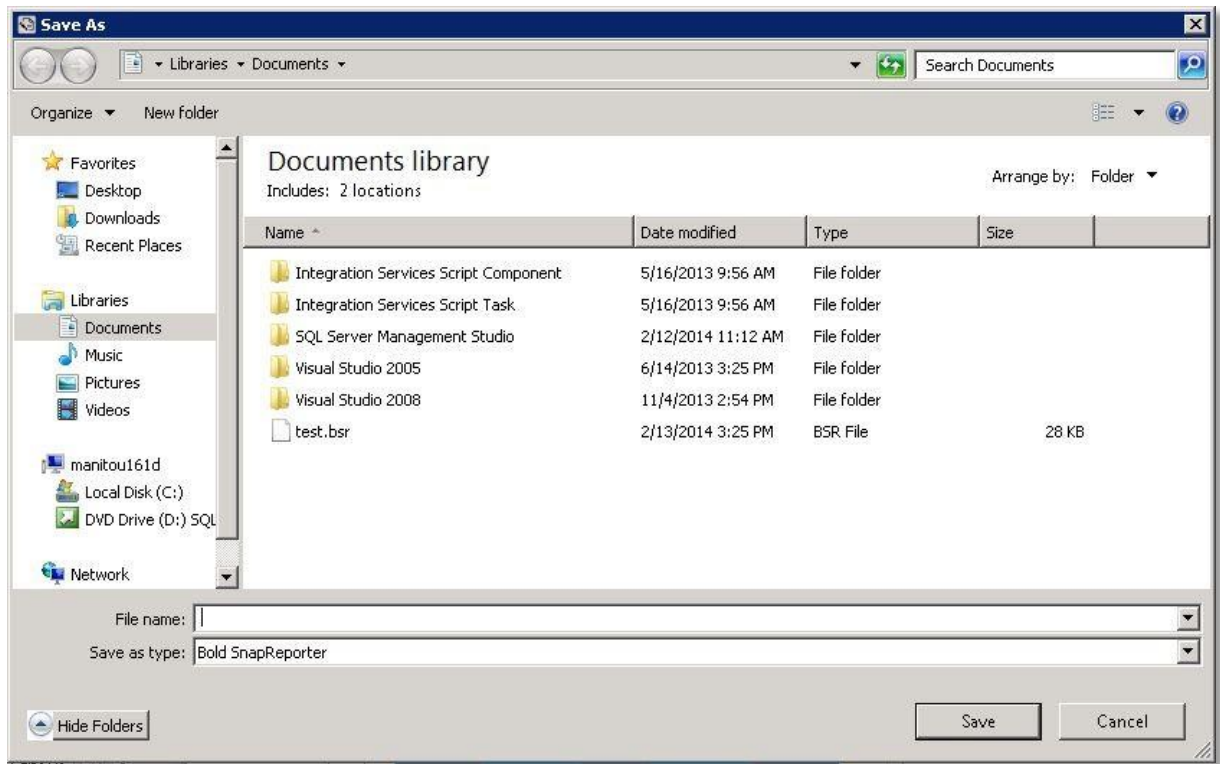


Saving and Distributing a Report

Saving and distributing reports from SnapReporter works like any other Windows-based software.

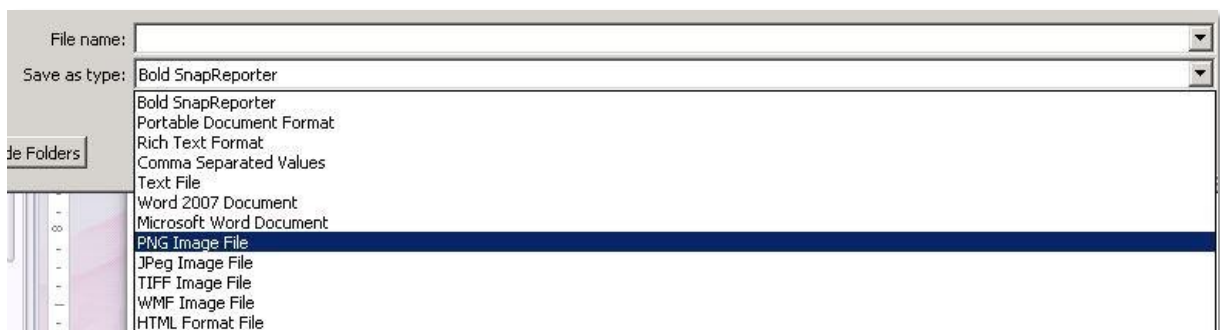
Save Your Snap Report

To save your Report, click **Save As** on the **File** menu.

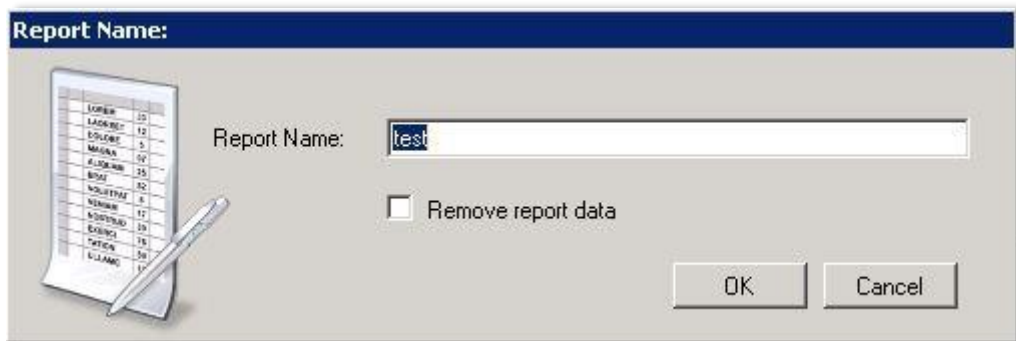


1. Enter a name for your Report in the **File name** box.
2. If you want to save your Report as a file type other than **.bsr** (.bsr is the default file type), select another option from the **Save as type** box.

Note: Selecting another file type option will prevent you from further editing your Report in SnapReporter.



3. Click **Save**.



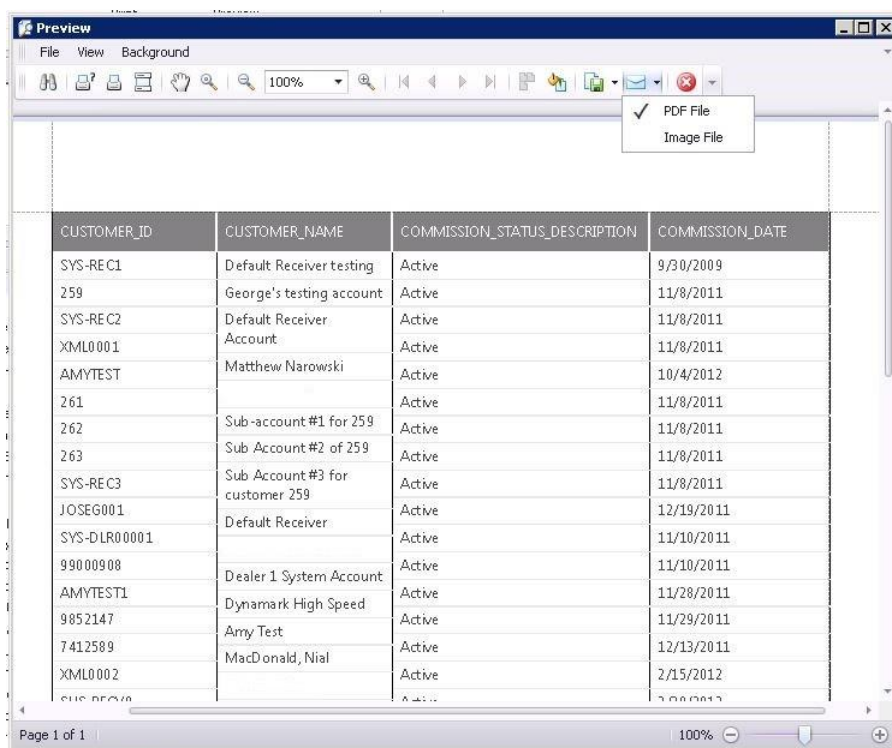
4. If you want to remove the data from your Report so you can share the format (but not the data) with other SnapReporter users, select the **Remove report data** check box.
5. Click **OK**.

Print or Export Your Snap Report

To print a Report, select a print option from the **File** menu.

To export to **.csv**, ensure your Report is in column format and all headers have been removed. Then, select **Save As** and choose **Comma Separated Values (*.csv)** from the **Save as type** box.

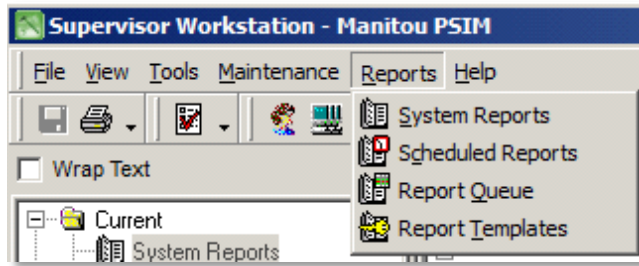
To export your Report to a .pdf or image file, click **Print Preview** from the **File** menu. From the **Preview** screen, click the down arrow next to the **Envelope** icon, and select a file format.



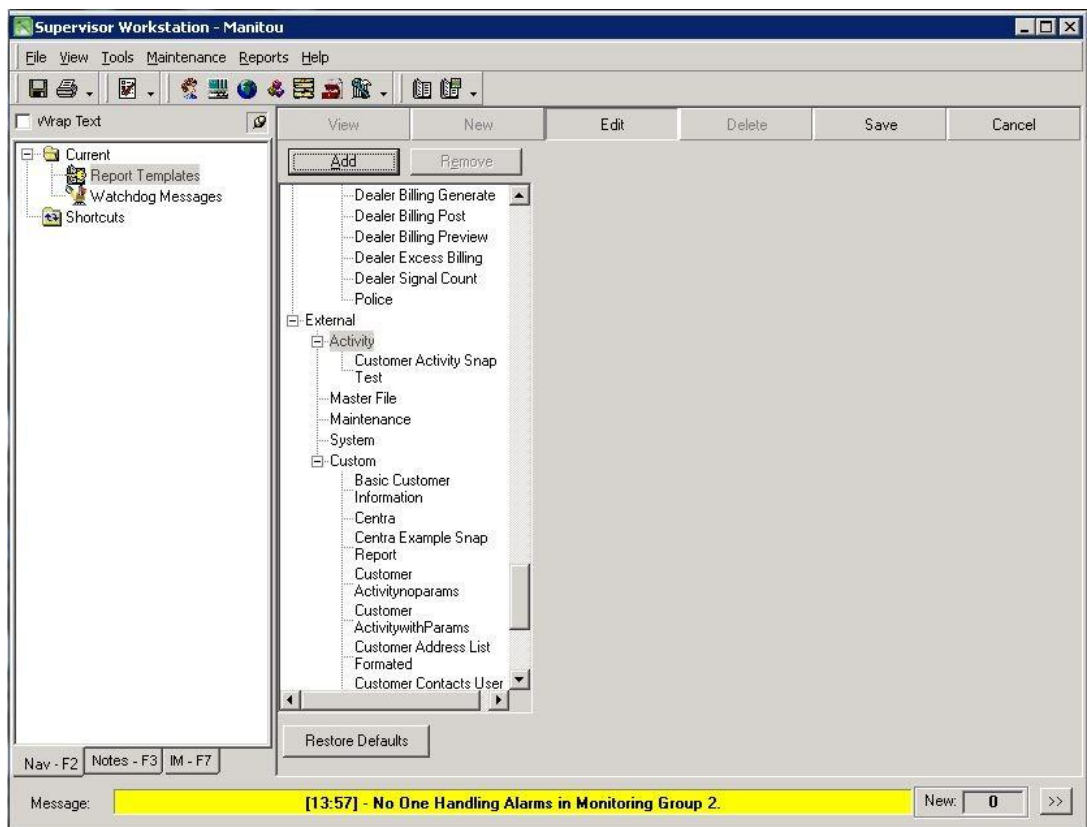
Importing a Report into Manitou

You can import Reports from SnapReporter into Manitou using Manitou's Supervisor Workstation.

1. From the Supervisor Workstation, navigate to the Reports menu and select **Report Templates**.

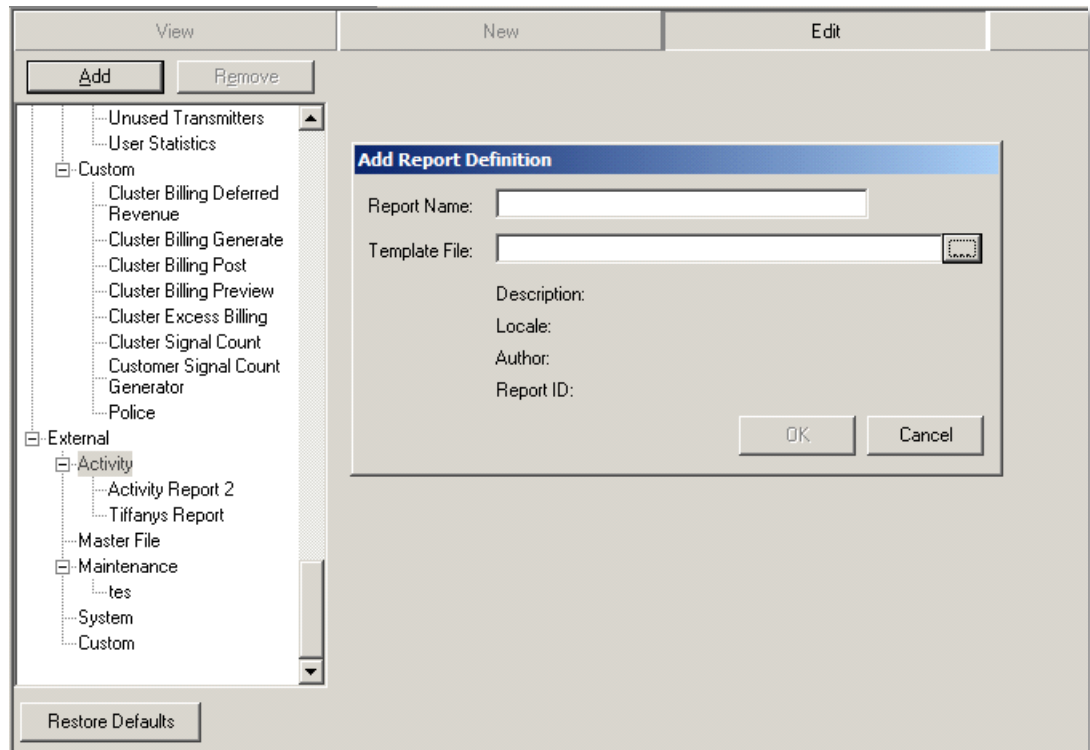


2. Click **Edit**.
3. Find the **External** section on the Navigation Tree, and select the **External** child node you want to designate as the destination for your Report.

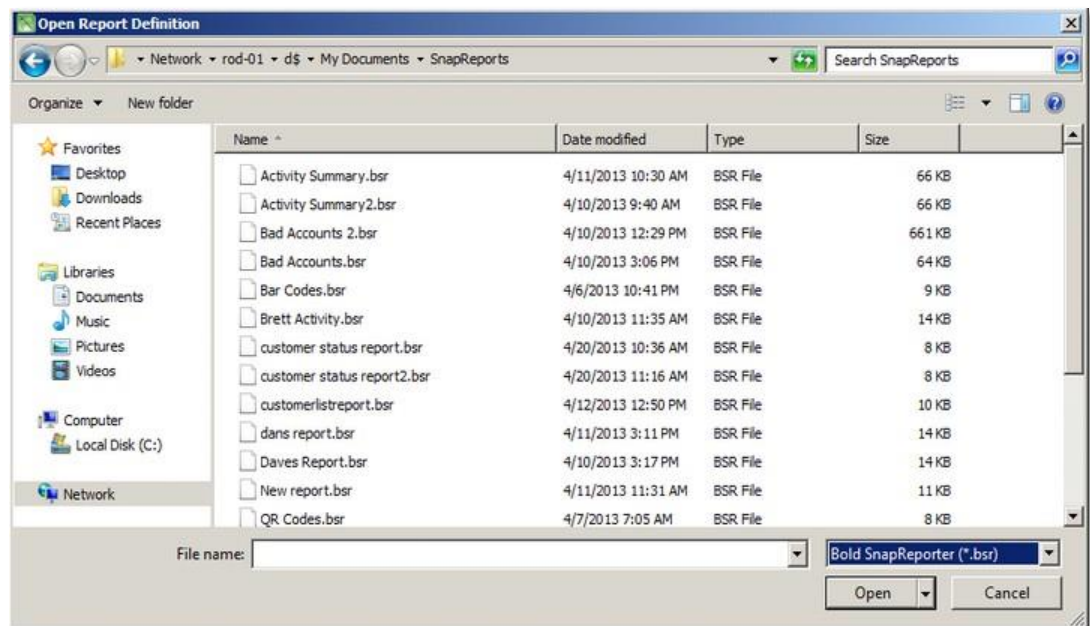


4. Click **Add**.

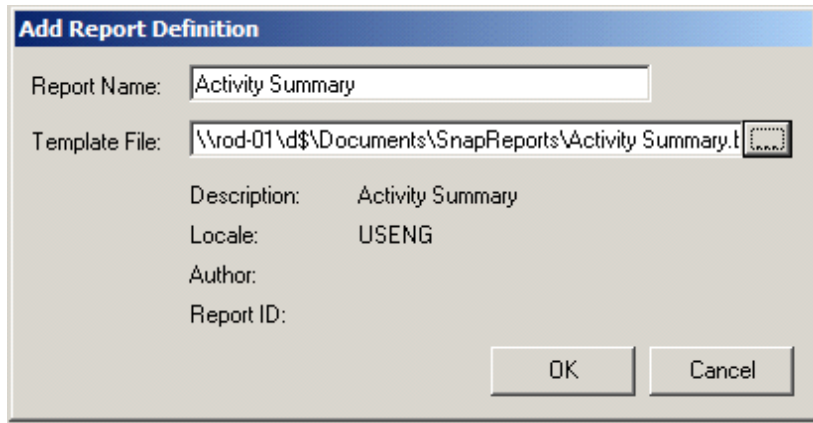
5. In the **Add Report Definition** dialog, enter a name for your Report, and click the **Ellipsis** button next to the **Template File** box.



6. Browse to the location of the file you want to import, and click **Open**.



7. At the **Add Report Definition** dialog, click **OK** to import the Report into Manitou.

A screenshot of the 'Add Report Definition' dialog box. It has a title bar with the text 'Add Report Definition'. Inside, there are several fields: 'Report Name' with the value 'Activity Summary', 'Template File' with the path '\\rod-01\d\$\Documents\SnapReports\Activity Summary.t', 'Description' with 'Activity Summary', 'Locale' with 'USENG', 'Author' (empty), and 'Report ID' (empty). At the bottom right are 'OK' and 'Cancel' buttons.

Add Report Definition

Report Name: Activity Summary

Template File: \\rod-01\d\$\Documents\SnapReports\Activity Summary.t

Description: Activity Summary

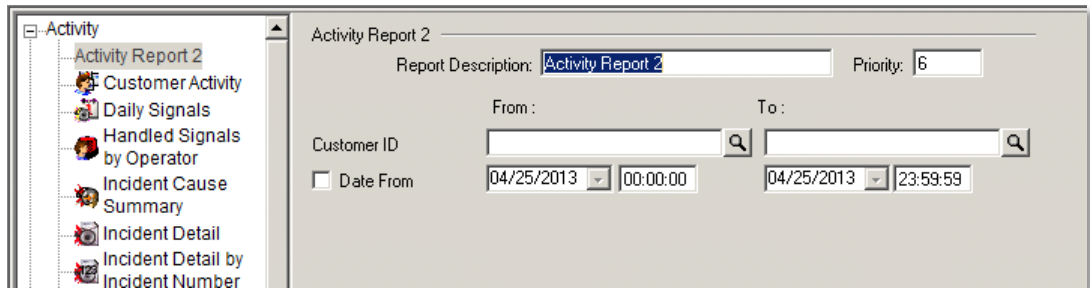
Locale: USENG

Author:

Report ID:

OK Cancel

8. To confirm the import was successful, click **System Reports** from the Reports menu and view the newly imported Report in the available Reports list.

A screenshot of the Manitou Reports interface. On the left is a tree view under 'Activity' containing 'Activity Report 2', 'Customer Activity', 'Daily Signals', 'Handled Signals by Operator', 'Incident Cause Summary', 'Incident Detail', 'Incident Detail by Incident Number', and 'Incident Number'. The right pane shows 'Activity Report 2' selected. It has a 'Report Description' field with 'Activity Report 2', a 'Priority' field with '6', a 'From' field with '04/25/2013' and '00:00:00', a 'To' field with '04/25/2013' and '23:59:59', and a 'Customer ID' field with a search icon.

Activity Report 2

Report Description: Activity Report 2 Priority: 6

From : 04/25/2013 00:00:00 To : 04/25/2013 23:59:59

Customer ID

☐ Date From

All your parameters are available to run the Report like any other Manitou Report.

Note: Please note that images, charts, and graphics imported into Manitou do not display as they would from SnapReporter. We hope to address this issue in a future release of Manitou.