System Reports

Last Modified on 08/01/2024 11:11 am EDT

You must define parameters before running Manitou Reports. Because every Manitou Report is different, please refer to the documents below for instructions on the specific Report you want to run.

After you have set your Manitou Report parameters, you must define your Distribution list to indicate the format in which Manitou should send your Report, and the recipients to whom it should be sent. The instructions in this document apply to the following Report types:

- Activity Reports
- Custom Reports
- Maintenance Reports
- Master File Reports
- System Reports

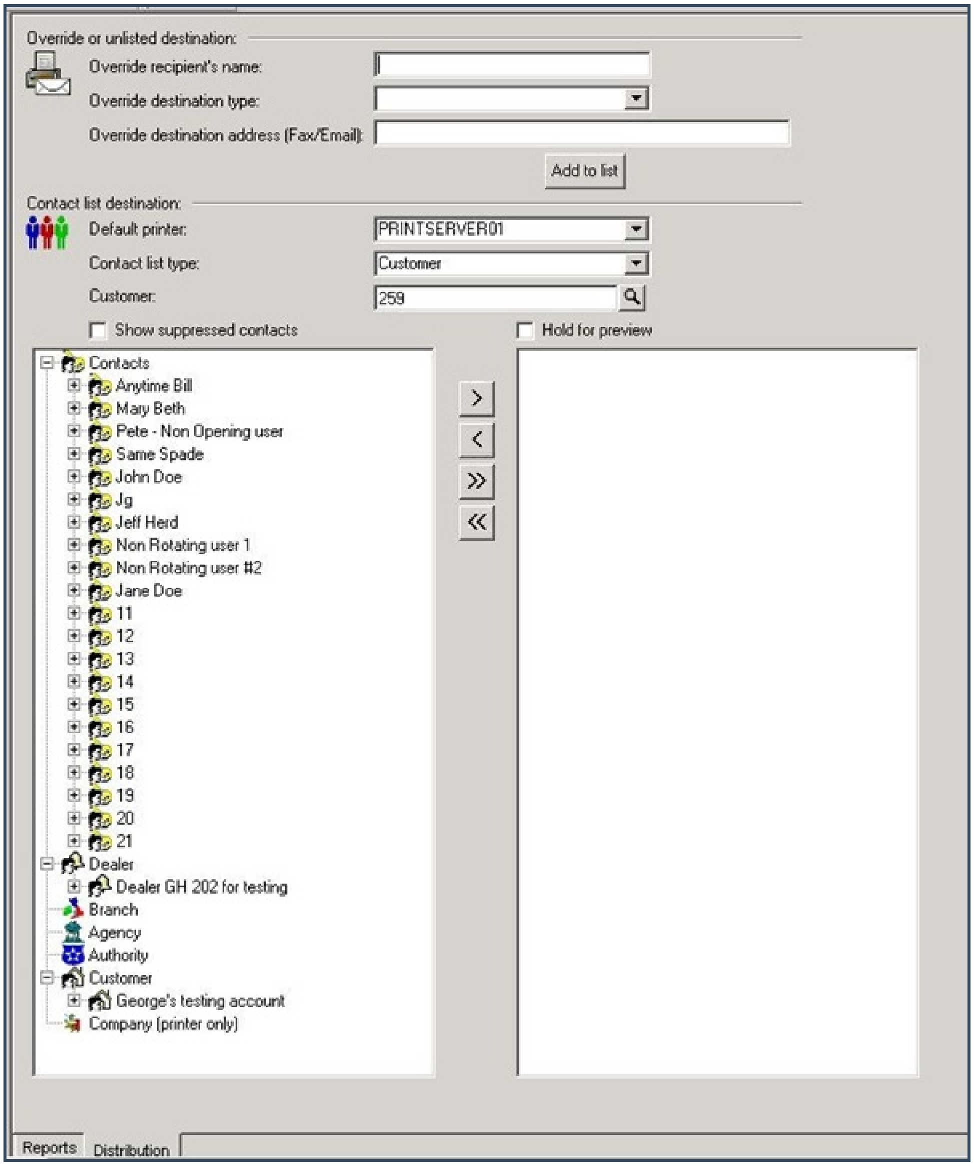
Because the instructions for Distributing your Report are the same for all these Report types, Report Distribution instructions are contained in this document only. Refer to the instructions for your specific Report and then refer to this document for Distribution instructions.

Adding Recipients to your Report Distribution List

Perform the following steps to define your Report Distribution List:

1. After you have entered all your Report parameters on the Reports Tab, click "Next" in the bottom-right corner of the Report form.

   Result: The "Distribution" Tab displays as shown in the following screenshot:



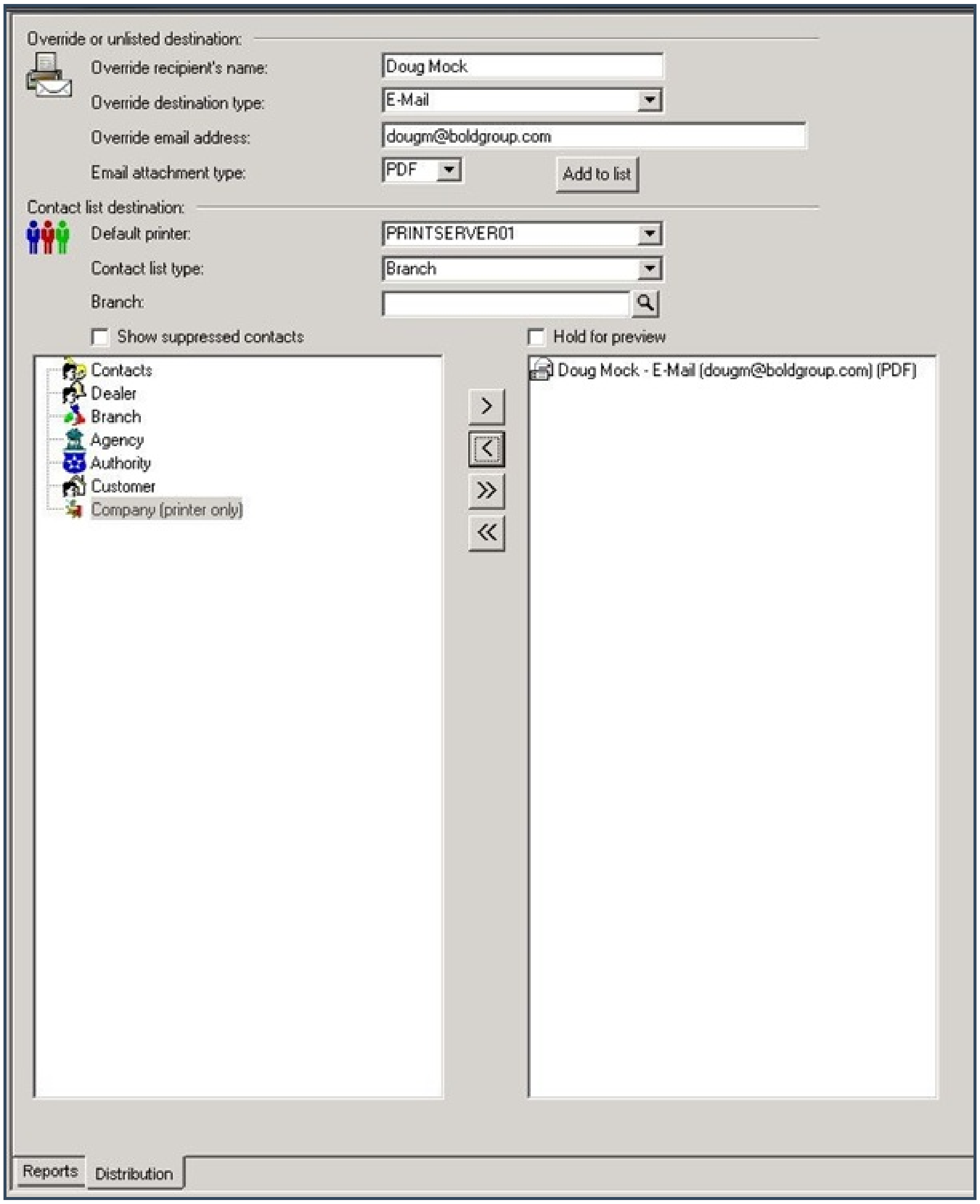
2. If you want Manitou to distribute your Report to a specific person, enter the recipient's name in the "Override recipient's name:" field.
3. Select a format in which to distribute your Report from the "Override destination type:" dropdown menu.

   Note: Your options from the "Override destination type:" menu are "Fax", "E-mail", and "Printer".

   Result: If you selected email, a dropdown menu called "Email" displays. Select "PDF", "RTF" or "Text" as the attachment type. If you selected the fax option, the field to enter the fax number now displays as formatted when you click in the field. Enter the recipient's fax number (including area code).

4. Enter either a fax number or an email address for your Report recipient in the "Override destination address (Fax/Email):" field.
5. Click "Add to list".

   Result: the Report recipient you added now displays in the right window area as shown in the following screenshot:



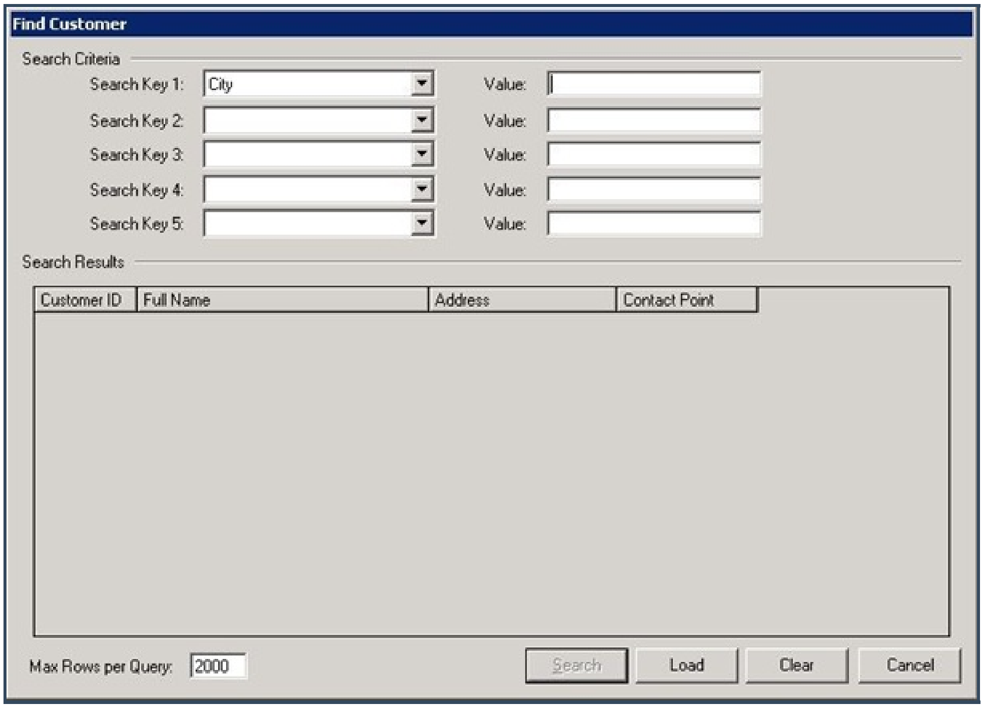
6. If you want to select an Entity as a recipient for your Report, you must define the parameters in the "Contact list destination:" area of the Distribution Tab.
7. If you want to define a destination printer, select it from the "Default printer:" dropdown menu.
8. Select an Entity from the "Contact list type:" dropdown menu.

   Note: Your options from the "Contact list type:" dropdown menu are "Company", "Customer", "Dealer", "Branch", "Agency", and "Authority".

   Result: The Contact List Type you selected now displays in the bottom-most field.

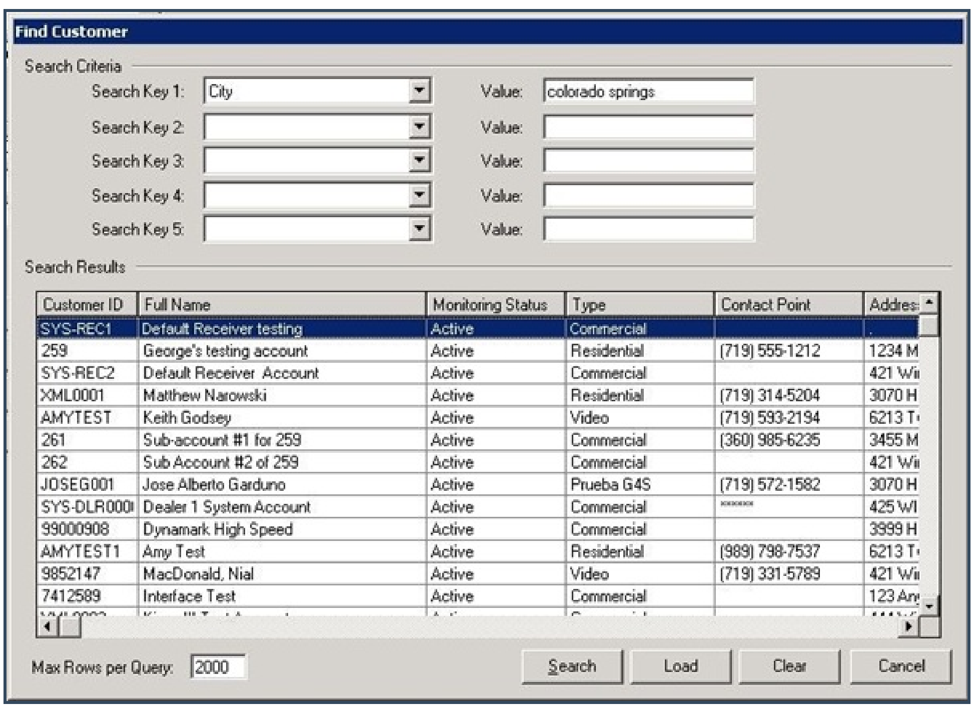
9. Click the lookup icon to the right of the bottom-most field.

   Result: The "Find" window displays for the Entity you selected as shown in the following screenshot:



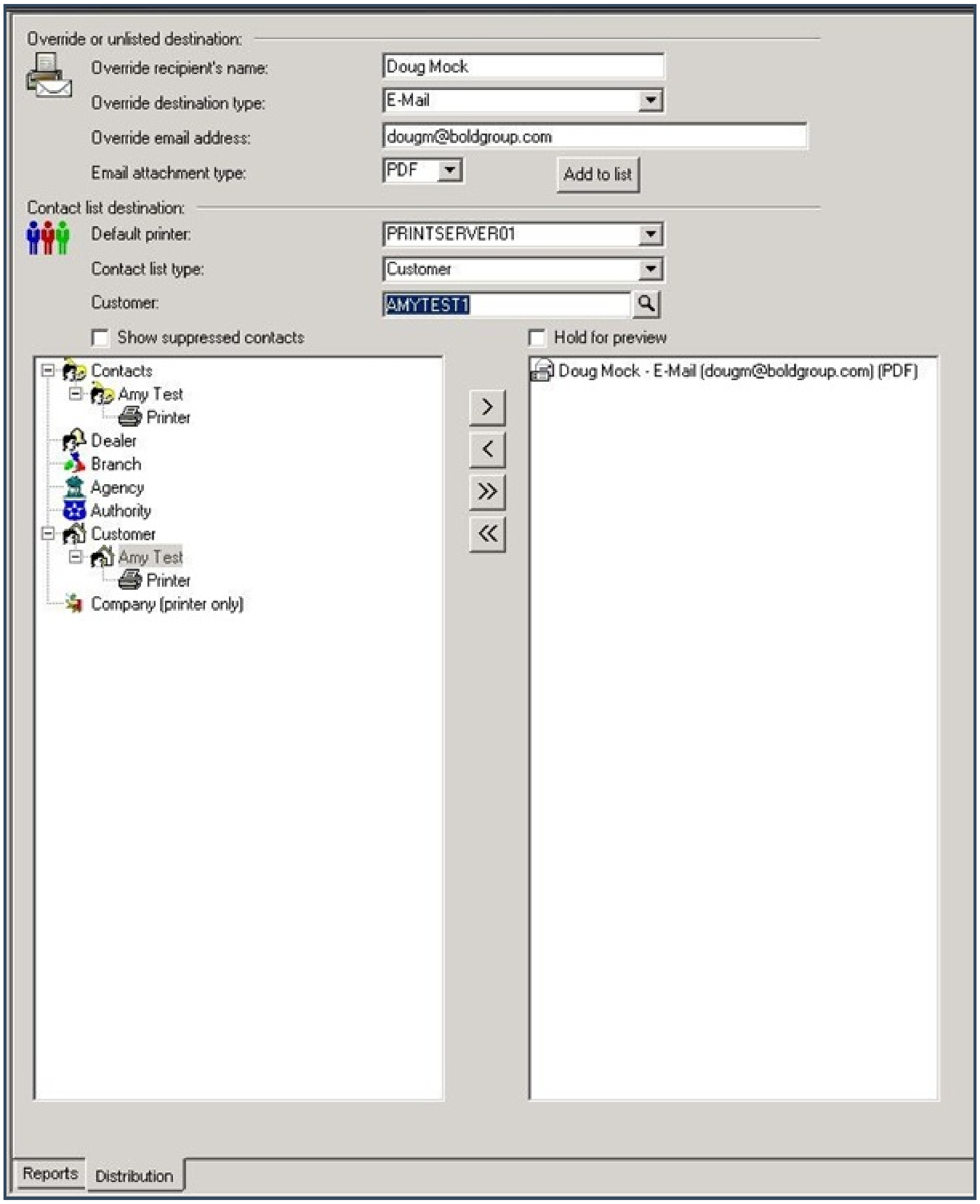
10. Enter search parameters to find the Entity you want to add as a recipient for your Report, and click "Search".

    Result: Your search results are displayed as shown in the following screenshot:



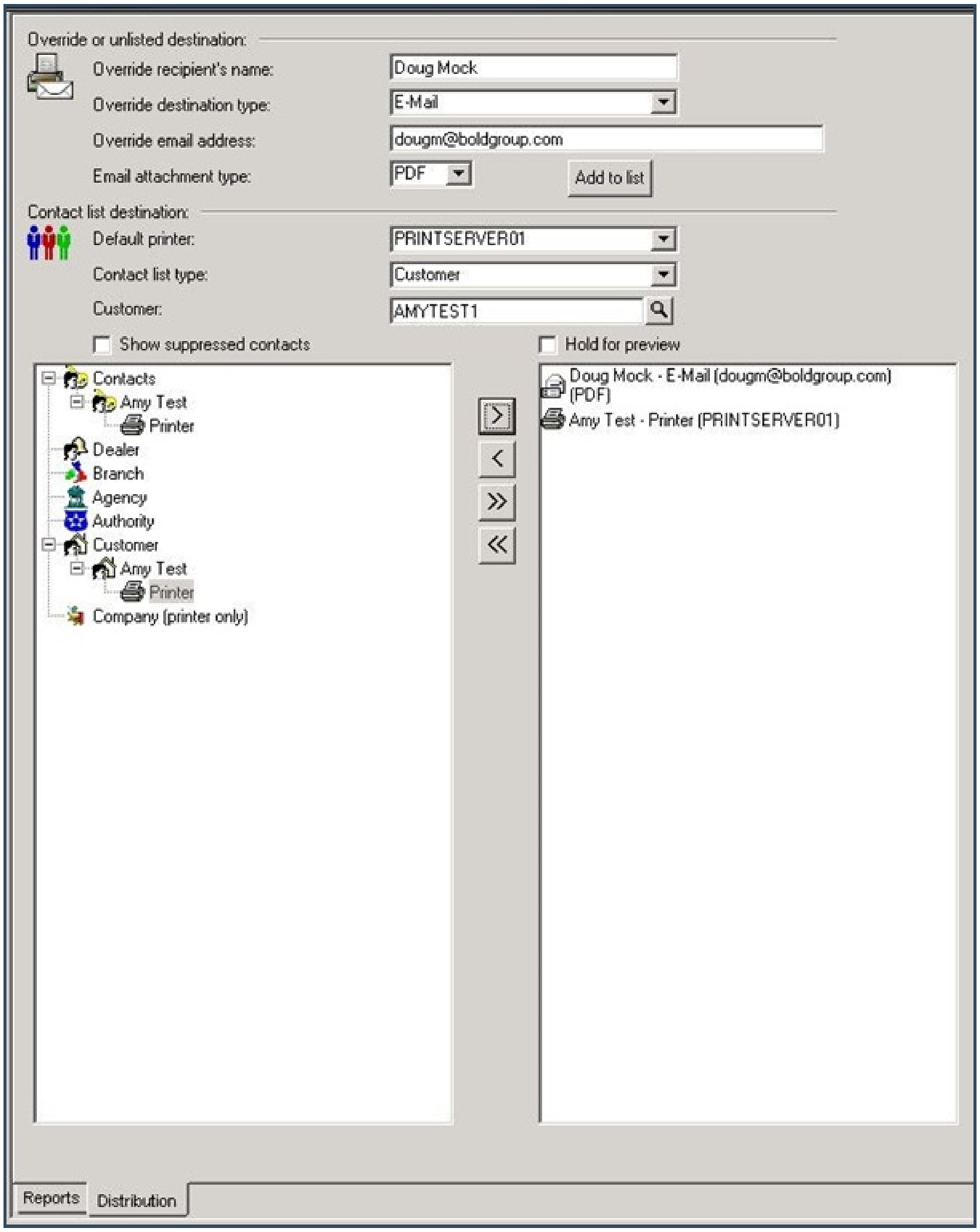
11. Select the Entity associated with your recipient, and click "Load".

    Result: The "Find" Entity window closes, and the system returns you to the "Distribution" Tab. The Entity you selected now displays in the bottom-most field and in the left window as shown in the following screenshot:



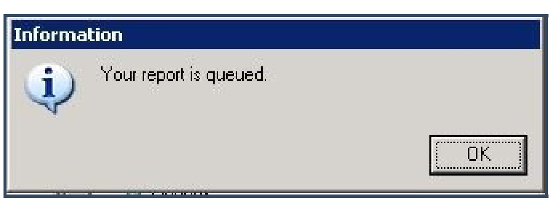
12. To add the Entity to your recipient list, select it, and click the right-facing single arrow.

    Result: The Entity you added now displays in the right window recipient list as shown in the following screenshot:



13. If you want, select the "Show suppressed contacts" checkbox.
14. If you want to preview your Report prior to distribution, select the "Hold for preview" checkbox.
15. When you have finished adding Report recipients, click "Finish" in the bottom-right corner of the form.

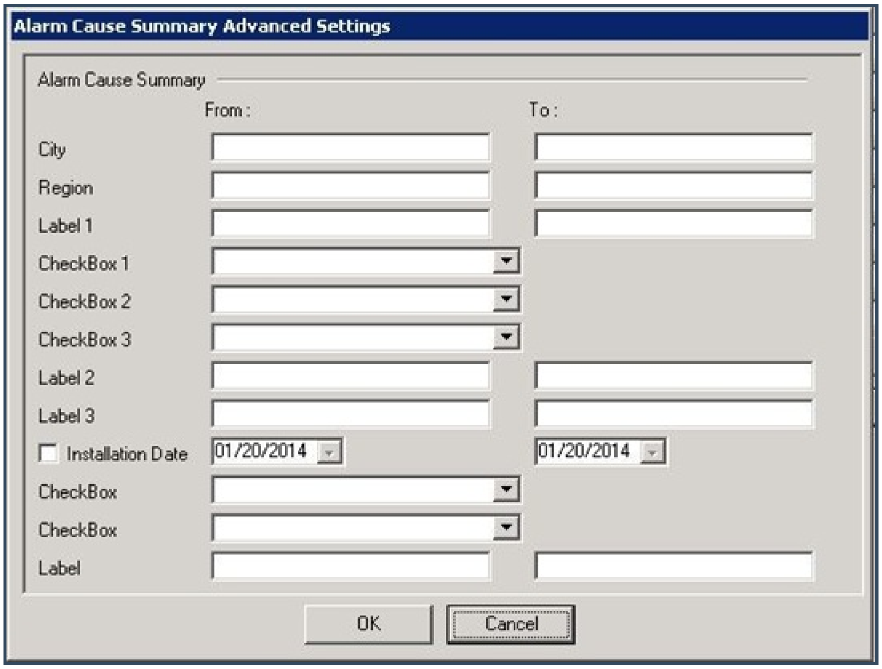
    Result: The "Information" window displays as shown in the following screenshot:



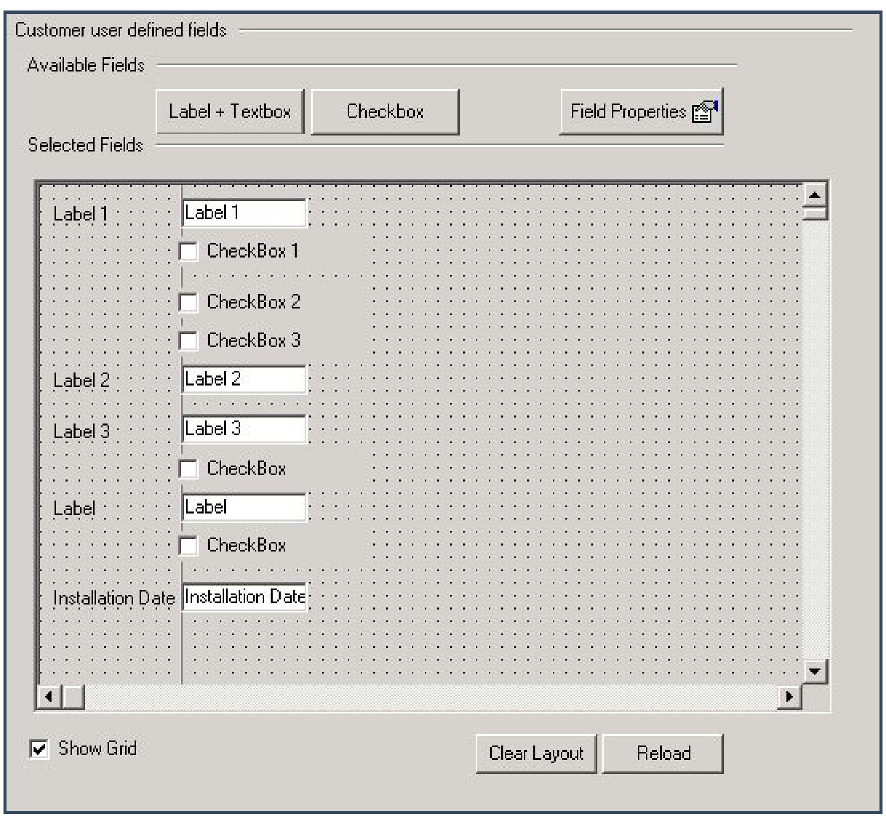
Accessing the Advanced Window

Some Report forms include an "Advanced" button as shown in the following screenshot:

Clicking the "Advanced" button results in the display of an Advanced Settings window similar to the Alarm Cause Summary Advanced Settings window displayed in the following screenshot:



These Advanced Settings windows correspond to the "Customer user-defined fields" form in the Tools menu, under Options, and Account Creation/Maintenance.



System Administrators can use the "Customer user-defined fields" form to customize the display and functionality for the Advanced Settings window.