

SWS - Forms in the Report Menu - System Reports - System Reports

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

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

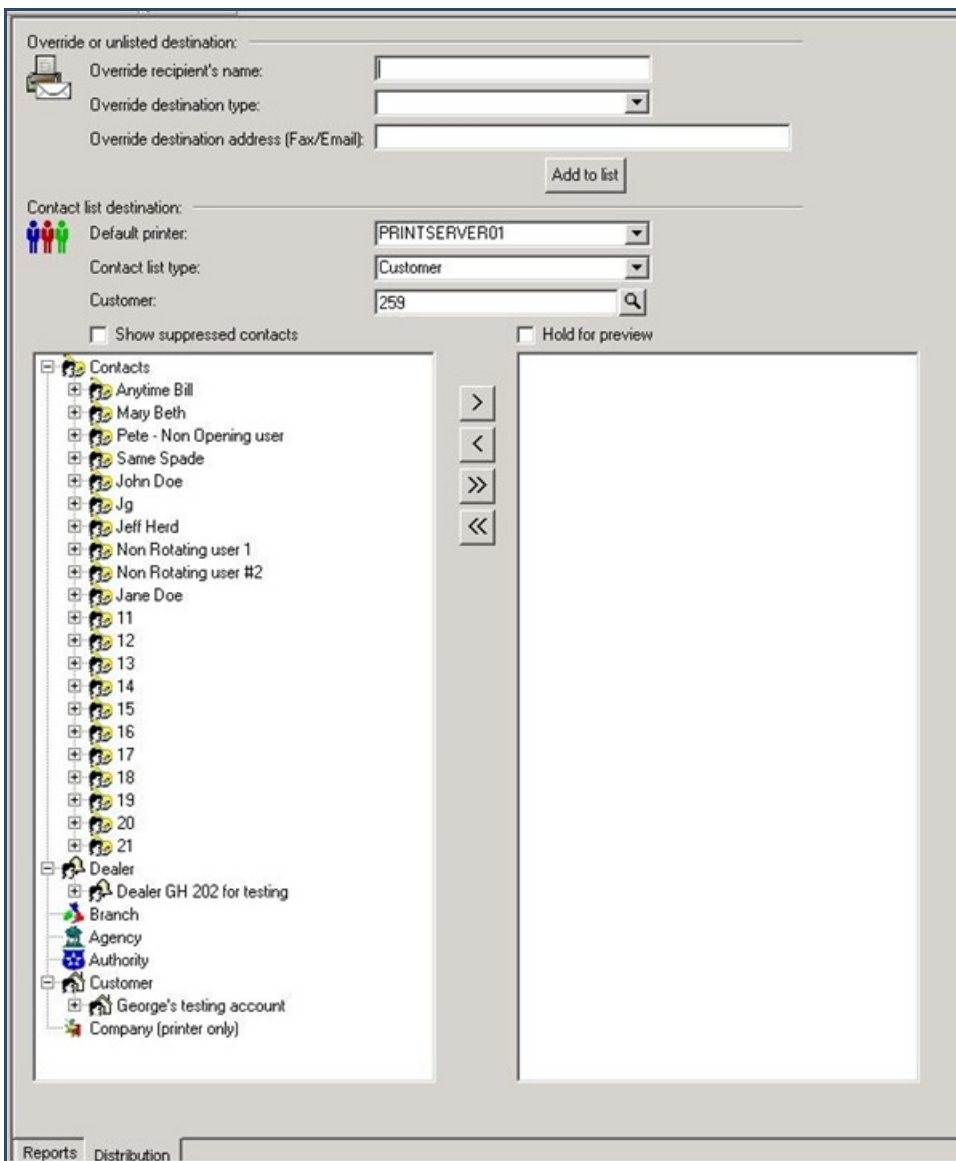
Because the instructions for Distributing your Report are the same for all these Report types, Report Distribution instructions are contained in this document only. Refer to the instructions for your specific Report, and then refer to this document for Distribution instructions.

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 attachment type:" 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 "Override fax number:" field. Enter the recipient's fax number (including the 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:

The screenshot shows a software interface for configuring report distribution. It is divided into two main sections: "Override or unlisted destination:" and "Contact list destination:".

Override or unlisted destination:

- Override recipient's name: Doug Mock
- Override destination type: E-Mail
- Override email address: dougm@boldgroup.com
- Email attachment type: PDF
- Buttons: Add to list

Contact list destination:

- Default printer: PRINTSERVER01
- Contact list type: Branch
- Branch: (empty field with a search icon)
- Checkboxes: Show suppressed contacts, Hold for preview

Contact List:

- Left pane: A list of contact types with icons: Contacts, Dealer, Branch, Agency, Authority, Customer, Company (printer only).
- Right pane: A preview window showing "Doug Mock - E-Mail (dougm@boldgroup.com) (PDF)".
- Navigation buttons: >, <, >>, <<

Bottom:

- Buttons: Reports, Distribution

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 is displayed for the entity you selected as shown in the following screenshot:

Find Customer

Search Criteria

Search Key 1: City Value:

Search Key 2: Value:

Search Key 3: Value:

Search Key 4: Value:

Search Key 5: Value:

Search Results

| Customer ID | Full Name | Address | Contact Point |
|-------------|-----------|---------|---------------|
| | | | |

Max Rows per Query: 2000

Search Load Clear Cancel

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 is displayed as shown in the following screenshot:

Find Customer

Search Criteria

Search Key 1: City Value: colorado springs

Search Key 2: Value:

Search Key 3: Value:

Search Key 4: Value:

Search Key 5: Value:

Search Results

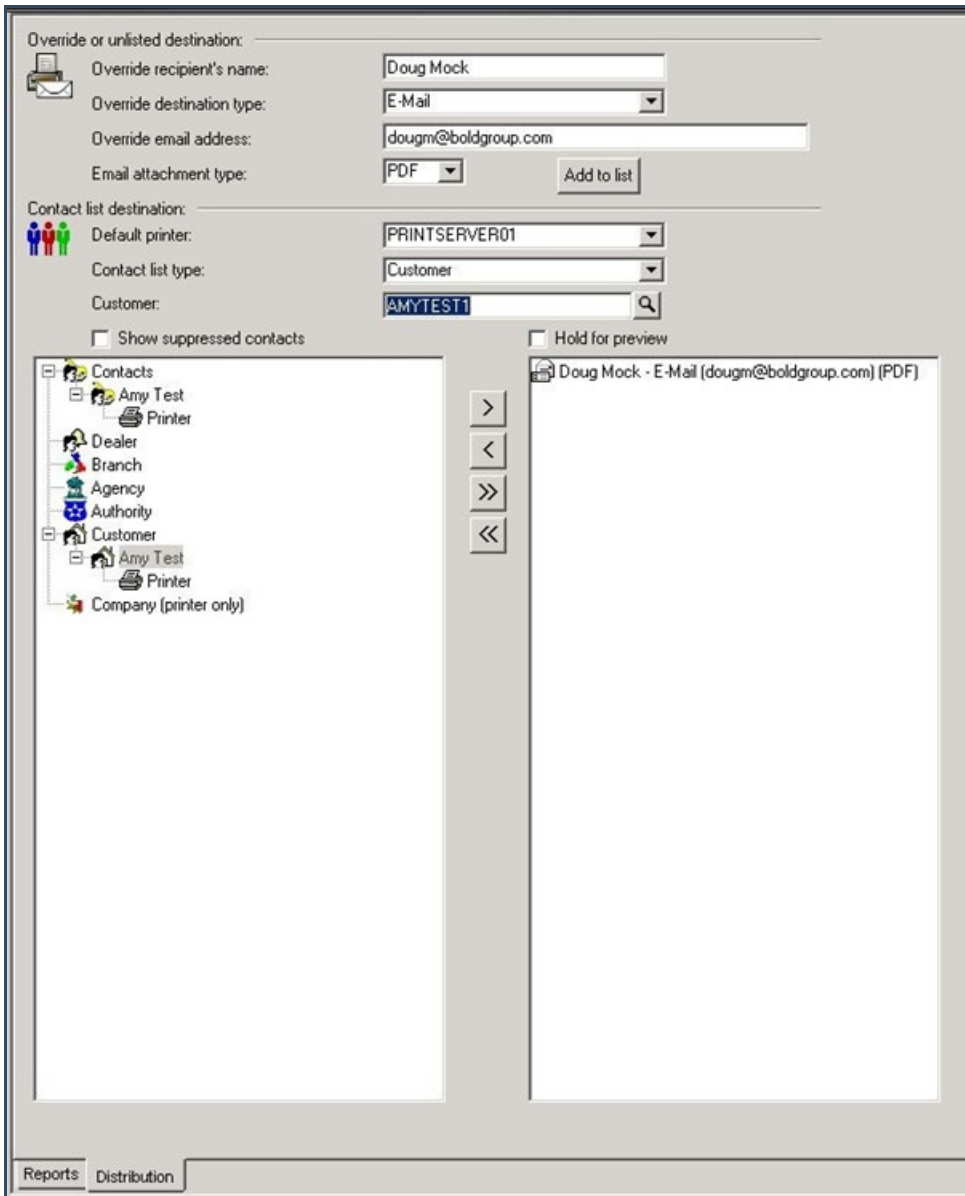
| Customer ID | Full Name | Monitoring Status | Type | Contact Point | Address |
|-------------|--------------------------|-------------------|-------------|----------------|---------|
| SYS-REC1 | Default Receiver testing | Active | Commercial | | |
| 259 | George's testing account | Active | Residential | (719) 555-1212 | 1234 M |
| SYS-REC2 | Default Receiver Account | Active | Commercial | | 421 Wi |
| XML0001 | Matthew Narowski | Active | Residential | (719) 314-5204 | 3070 H |
| AMYTEST | Keith Godsey | Active | Video | (719) 593-2194 | 6213 T |
| 261 | Sub-account #1 for 259 | Active | Commercial | (360) 985-6235 | 3455 M |
| 262 | Sub Account #2 of 259 | Active | Commercial | | 421 Wi |
| JOSEG001 | Jose Alberto Garduno | Active | Prueba G4S | (719) 572-1582 | 3070 H |
| SYS-DLR000 | Dealer 1 System Account | Active | Commercial | ***** | 425 WI |
| 99000908 | Dynamark High Speed | Active | Commercial | | 3999 H |
| AMYTEST1 | Amy Test | Active | Residential | (989) 798-7537 | 6213 T |
| 9852147 | MacDonald, Nial | Active | Video | (719) 331-5789 | 421 Wi |
| 7412589 | Interface Test | Active | Commercial | | 123 Any |

Max Rows per Query: 2000

Search Load Clear Cancel

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

Result: The "Find" 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:

Override or unlisted destination:

Override recipient's name:

Override destination type:

Override email address:

Email attachment type:

Contact list destination:

Default printer:

Contact list type:

Customer:

Show suppressed contacts

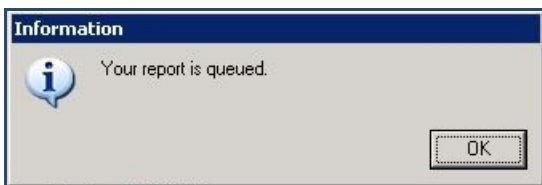
Hold for preview

Contacts
 Amy Test
 Printer
 Dealer
 Branch
 Agency
 Authority
 Customer
 Amy Test
 Printer
 Company (printer only)

Doug Mock - E-Mail (dougm@boldgroup.com) (PDF)
 Amy Test - Printer (PRINTSERVER01)

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:

Advanced...

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:

The screenshot shows a dialog box titled "Alarm Cause Summary Advanced Settings". It features two columns of input fields labeled "From:" and "To:". The fields include text boxes for "City", "Region", "Label 1", "Label 2", "Label 3", and "Label", as well as dropdown menus for "CheckBox 1", "CheckBox 2", "CheckBox 3", and "CheckBox". A date field for "Installation Date" is set to "01/20/2014". At the bottom, there are "OK" and "Cancel" buttons.

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

The screenshot shows a window titled "Customer user defined fields". It has two sections: "Available Fields" and "Selected Fields". The "Available Fields" section contains buttons for "Label + Textbox", "Checkbox", and "Field Properties". The "Selected Fields" section is a grid where fields are placed. The grid shows "Label 1", "Label 2", "Label 3", and "Label" with their respective textboxes, and "CheckBox 1", "CheckBox 2", "CheckBox 3", and "CheckBox" with their checkboxes. The "Installation Date" field is also present. At the bottom, there is a "Show Grid" checkbox (checked), and "Clear Layout" and "Reload" buttons.

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