

FormWriter Guide



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1. All Schedule Report Window

In this section we will discuss operations and procedures that can be performed from “All Scheduled Report Window”. For details about how to actually schedule a report for automatic generation, please go to section 4 “Scheduling Report” starting on page 38.

This Window is very important because it allows you to visualize and to administer all the reports scheduled for automatic generation. Every time that you schedule a new report, this will be added to the list of this window.



Description	Report Name	Report Type	Start Generation Date
Account Dispatch Report for Excel via Email	C:\PROGRA~1\S...	Account Listing Report	04/14/2003
Account Status Report for NOT's	C:\PROGRA~1\S...	Schedule List	07/19/2002
Accounts /w GT+5 LTC's /M to Spv for Excel via Email	C:\PROGRA~1\S...	Numerical Account Statistics Li...	07/01/2002
Accounts /w GT+7 EOP's /M to Spv for Excel via Email	C:\PROGRA~1\S...	Numerical Account Statistics Li...	07/01/2002
Accounts /w Non-OC GT+10 Except /M to Spv for Excel vi...	C:\PROGRA~1\S...	Numerical Account Statistics Li...	07/01/2002
Accounts /w OC GT+130 Signals /M to Spv for Excel via Email	C:\PROGRA~1\S...	Numerical Account Statistics Li...	07/01/2002
Accounts Events Summary for Excel via Email	C:\PROGRA~1\S...	Event Summary Report	04/07/2003
Cancelled Accounts Report	C:\PROGRA~1\S...	Account Listing Report	07/19/2002
CS Operator Response by Account for Excel	C:\PROGRA~1\S...	Event Response Account Stabi...	08/01/2002
CS Operator Response by Dealer for Excel	C:\PROGRA~1\S...	Event Response Dealer Statist...	08/01/2002
CS Operator Response by Mnemonic for Excel	C:\PROGRA~1\S...	Event Response Dealer Statist...	08/01/2002
CS Traffic Statistical /M to Spv for Excel via Email	C:\PROGRA~1\S...	Numerical Dealer Statistics List...	07/01/2002
Dealer Accounts /w GT+5 LTC's /M via Email	C:\PROGRA~1\S...	Numerical Account Statistics Li...	07/01/2002
Dealer Accounts /w GT+5 LTC's /M via Fax	C:\PROGRA~1\S...	Numerical Account Statistics Li...	07/01/2002
Dealer Accounts /w GT+7 EOP's /M via Email	C:\PROGRA~1\S...	Numerical Account Statistics Li...	07/01/2002
Dealer Accounts /w GT+7 EOP's /M via Fax	C:\PROGRA~1\S...	Numerical Account Statistics Li...	07/01/2002
Dealer All Events Grp Detail Daily via Email	C:\PROGRA~1\S...	Event Detail Listing Report	07/19/2002
Dealer All Events Grp Detail Daily via Fax	C:\PROGRA~1\S...	Event Detail Listing Report	07/19/2002
Dealer All Events Grp Intermediate Daily via Email	C:\PROGRA~1\S...	Event Intermediate Listing Re...	07/19/2002
Dealer All Events Grp Intermediate Daily via Fax	C:\PROGRA~1\S...	Event Intermediate Listing Re...	07/19/2002
Dealer OC Bi-Weekly Account Summary via Email	C:\PROGRA~1\S...	Open/Close Summary Report	07/01/2002

Figure 1 – All Schedule Report Window

There are two ways of having access to this window. The first one is by pressing function key <F6>. The second one is by this function of the FormWriter Menu: “Options → Show All Scheduled Reports...” (see Figure 2).

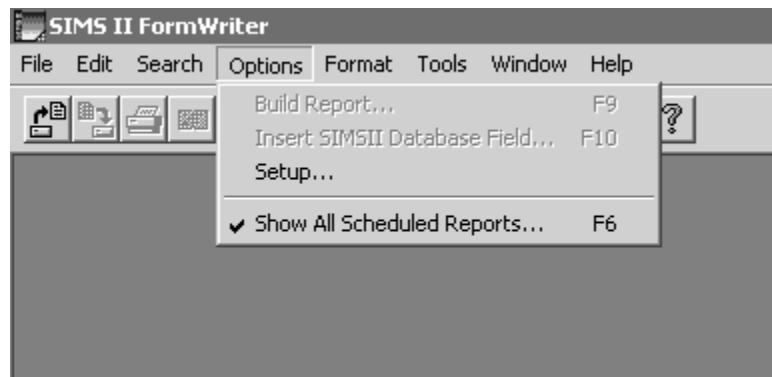


Figure 2 - Opening "All Scheduled Window"

Column Description

We are going to explain next the meaning and purpose of every one of the columns that make part of the All Scheduled Report Window.

Description

It shows the description text that you assigned to every one to the reports during the setup process. (See Step 3 of “Adding A New Scheduled Report”).

Report Name:

It shows the path and file name of the report format choose for every one of the scheduled report.

Report Type:

This column shows the type of report of every scheduled report (For example: Open/Close Summary Report, Event Detail Listing Report, etc).

Start Generation Date:

It shows the Start Generation Date that you assigned to the report during the setup process. (See Step 3 of “Adding A New Scheduled Report”).

Next Generation Date:

It shows the next date when the report should be generated according to its setup.

Star Time:

It shows the time at which the report should be generated (according to its own setup).

End Time:

It shows the ending time of the last generation report process.

Report Status:

This column shows different messages according to the current status of the scheduled report. These are some of the messages that could appear in this column:

- **Report Inactive:** This is the message that normally appears when the schedule report is idle.

- **Generating Report:** This message appears when FormWriter is generating the report
- **E-Mailing Report**
- **Printing report**
- **Faxing Report**
- **Disable Report:** This message appears when the scheduled report has been disabled for generation by a FormWriter user.

Report Message:

In this column FormWriter shows the error messages (if any) for every scheduled report.

Deleting a Scheduled Report

If you want to delete permanently a scheduled report then highlight the scheduled report from the “All scheduled Reports” Window and strike the <Delete> key or right-click the mouse and select “Delete Scheduled Report” from the popup menu. (See figure 3).

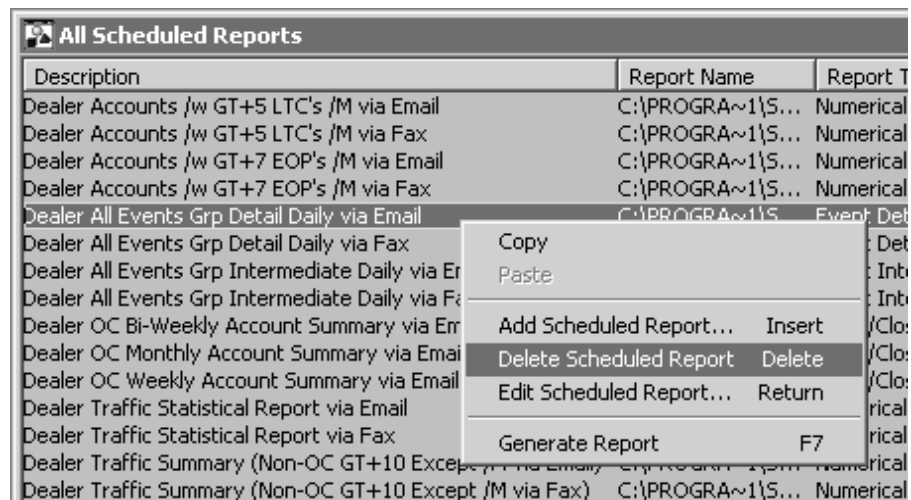


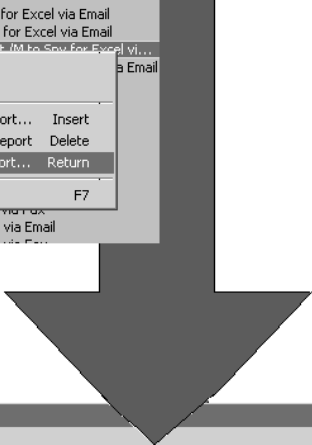
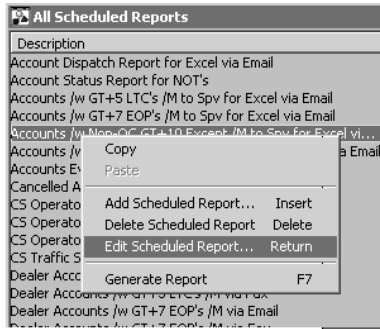
Figure 3 - Deleting a Scheduled Report

Editing Settings of a Scheduled Reports

If you want to modify any of the parameters of a report already scheduled, then highlight the scheduled report and strike the <Enter> key or right-click the mouse and select “*Edit Scheduled Report*” from the popup menu. This will take you to the window “Schedule Report” where you will be able to change the different parameters of the scheduled report. Please see next figure.

Note: Editing or deleting a scheduled report while it is generating is not allowed.

Note: For details about setting a scheduled report please see section 4 “Scheduling a Report” on page 38.



Schedule Report

Jan	Feb	Mar	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec

Sun
 1
 2
 3
 4
 5
 6
 7
 8
 9
 10
 11
 12
 13
 14
 15
 16
 17
 18
 19
 20
 21
 22
 23
 24
 25
 26
 27
 28
 29
 30
 31

Generate at End of Month

Report Interval:
 Yearly
 Monthly
 Weekly
 Daily
 Hourly

Frequency:

Date Interpretation:
 Absolute
 Day of month

Generate At:
 ...

Report Description:

Report Information:

Name: C:\PROGRAMS\SIMS\SIMSII\1\H-N-N-AC	Description: Account Numerical Statistic Report in Comma delimited form for importing into Microsoft Excel
Type: Numerical Account Statistics Listing Report	
Start generation: 07/01/2002	Next generation: 01/01/2007
Last form update: 07/28/2002	

Figure 4 - Editing a Scheduled Report

Copying a Scheduled Report

There are many circumstances in which you may want to have a scheduled report similar to another already existing. In these cases the best option is to make a copy of the report and then make the necessary modifications over the copy (This is easier than start a scheduled report from zero).

To copy a scheduled report to the Windows clipboard, highlight the scheduled report and right-click the mouse and select “Copy” from the popup menu.

Now right click anywhere inside the “All Scheduled Report Window” and select “Paste” from the popup menu.

This way you will have a duplicated of the report selected. Now you can proceed to make changes over this report (see “Editing Settings of a Scheduled Report” on page 5). For a graphical description of this procedure please see next figure.

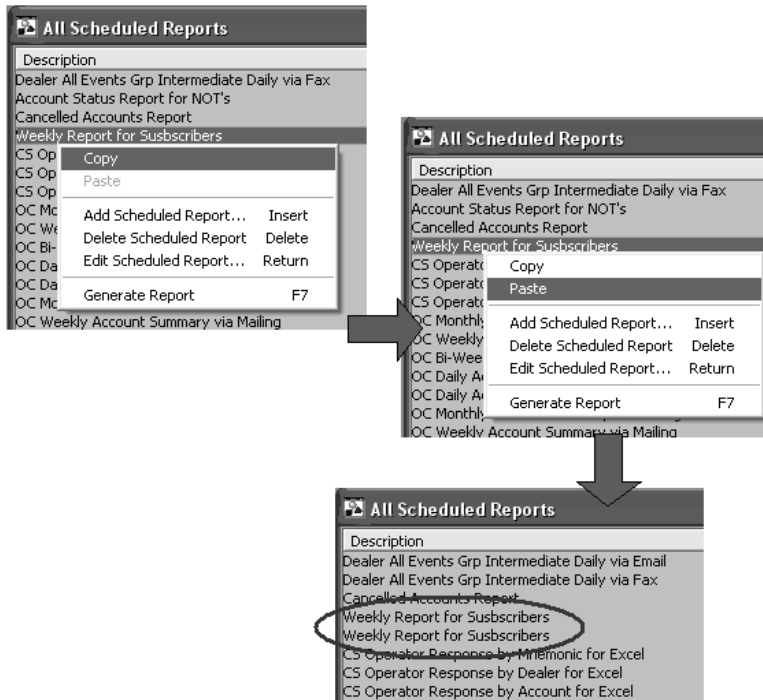


Figure 5 - Copying a Scheduled Report

Generating a Scheduled Report from the “All Scheduled Reports Window”.

You can generate any scheduled report at any time you want independently of the generation time/date assigned to the report. To do this highlight the scheduled report and strike the <F7> key or right-click the mouse and select Generate Report form the popup menu.

***Note:** Editing or deleting a scheduled report while it is generating is not allowed.*

2. Creation of a New Report Format.

One of the features that makes FormWriter a powerful tool for your Central Station is the ability to create new Report Formats according with your specific needs. To do this, you can use virtually any field from the SIMSII Account or Group DataBase. Additionally you can also create new historical reports formats.

Although the creation of a new report format may be somewhat complex, we are going to explain how to create an Account Database Report Format and a Historical Report Format. Taken these examples as a reference you should be able to create most of the reports formats that you could need.

Example #1: How to Create an Account Database Report Format.

This kind of reports formats allows you to include any field of the SIMS II Account Data Base in virtually any combination you want. In this example we are going to create a report format that will display three fields: Account Number, Control Type and Address.

Step #1

Select “Report Form” from the FormWriter Menu:
“File → New → Report Form”



Figure 6 - Creating a New Report Format

Step #2

Type the name you want to give to your new report format and click Open button. FormWriter will create a file with that name and an extension “fwr”.

In this example we are going to name our report format as “test”.

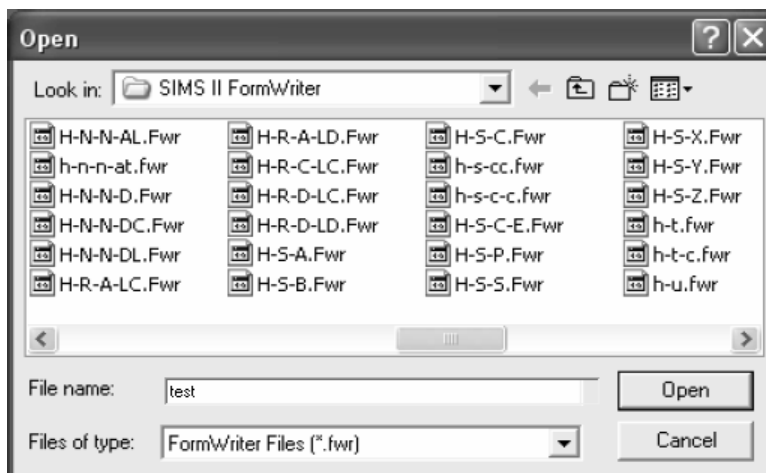


Figure 7 - Naming Report Format

Step #3

A window titled as “Report Form Information” will show up. Please see next figure:

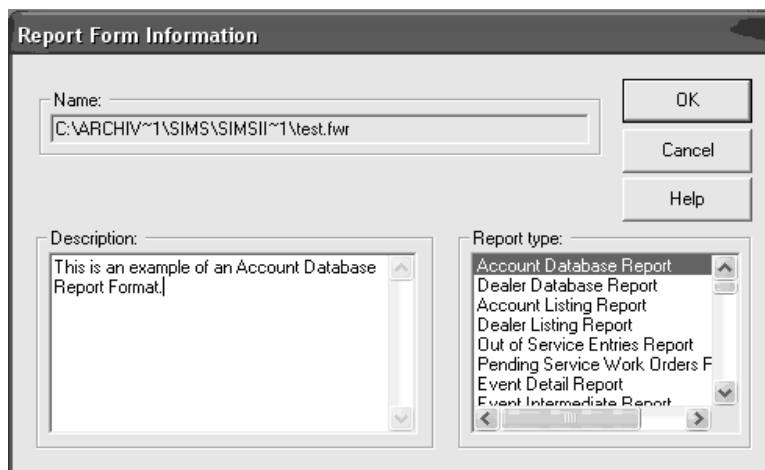


Figure 8 - Selecting Report Type

From the list “Report type” select the option “Account Database Report”. The box named “Description” allows you to type any comment about the report format that you are creating (this field is optional). Click the “OK” button.

Step #4

A window titled with the name you gave to your report format will show up (see next figure). This is the “construction window” where you are going to determine which fields are going to be part of the report as well as their position. Think of this window as a “piece of paper” where you are going to design your report format.

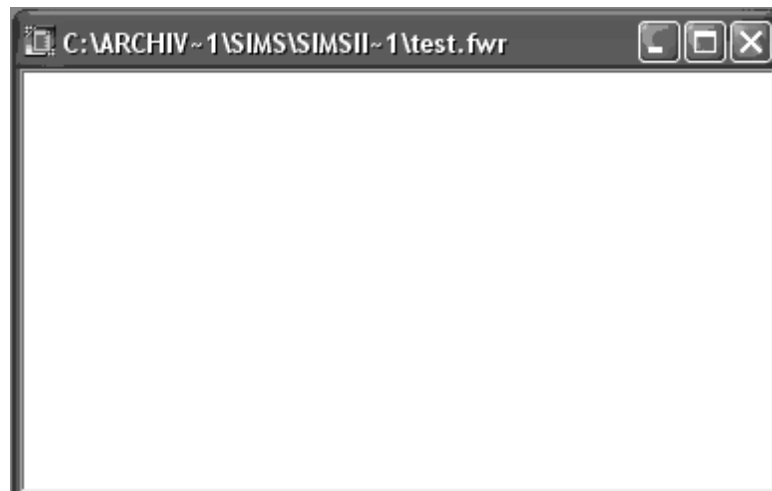


Figure 9 - Construction Window

Step #5

In this example we are going to create a report easy to open from a Spreadsheet like Excel. This is the reason why we are going to include titles and we are going to separate the fields with the character comma “,”. You can use “;” too.

The first thing to do is to write the titles for the fields. In order to move the cursor trough the construction window you should use these keys: <Space Bar>, <Enter>, <BackSpace> and the arrows.

Now put the cursor in the position where you want to write down the first title and write “Acct Number” followed by comma “,” as shown in Figure 10.

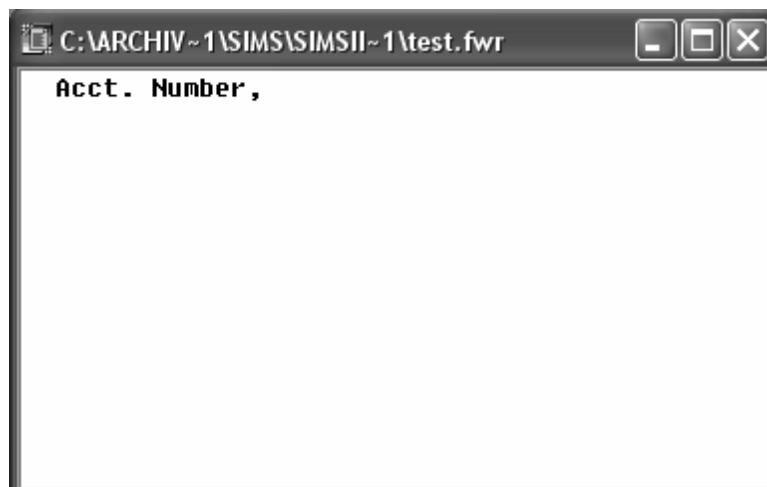


Figure 10 - Construction Window

The next step is to write the other two titles leaving some space between them. Now the construction window should look something like next figure:

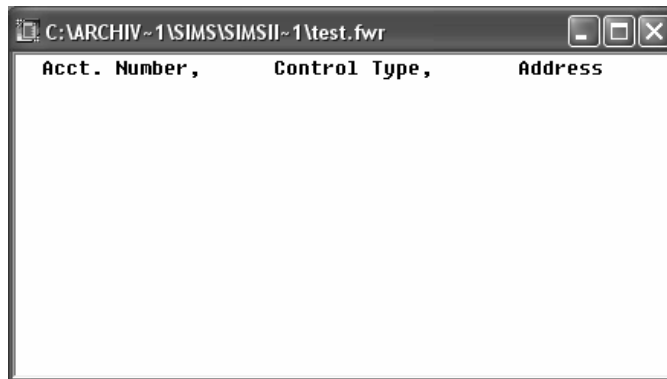


Figure 11 - Construction Window

Step #6

Before start inserting the fields that are going to be part of our report format, it is necessary to insert a special field required by the FormWriter syntaxes. Place the cursor in the position where you want to start inserting the SIMS II database fields (in this case below the title "Acct. number".) Right-click the mouse and select "Insert SIMSII Database Field" from the popup menu or strike <F10>.

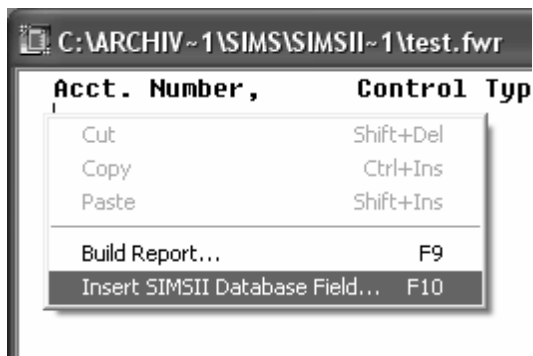


Figure 12 - Inserting Fields

A window titled “Available SIMSII Database Fields” will show up. This window will display a list of all the fields that make part of the SIMSII Account DataBase.

Select the field “Account Begin List Block”. Click the Ok button. (Note that the fields are listed in alphabetical order)

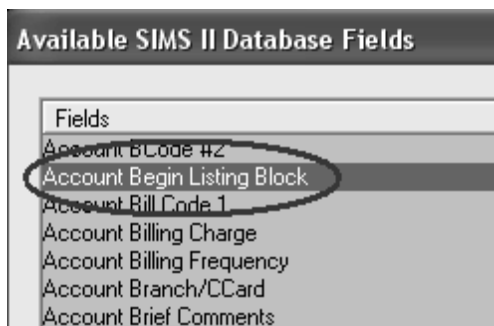


Figure 13 - Available SIMS II Database Fields

Now the construction window should look similar to Figure 14.

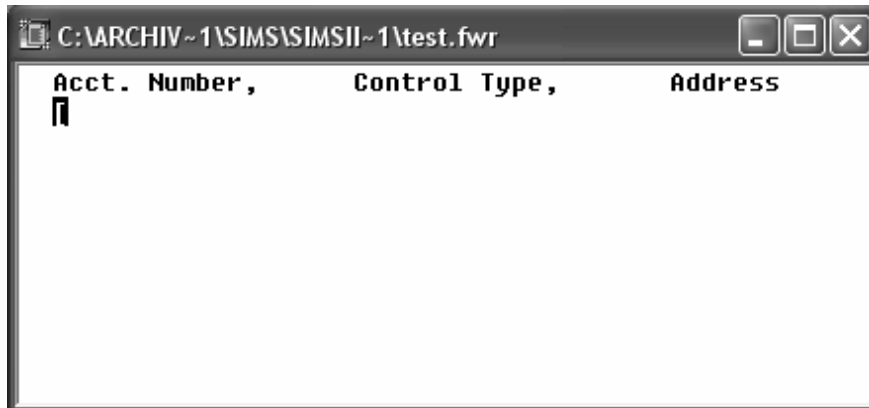


Figure 14 - Construction Window

The “Account Begin Listing Block” that you just inserted is represented by the character “[“. Beyond this point you will be able to insert the actual fields that are going to be part of your report.

Step #7

Click anywhere on the construction window in order to show the cursor. Now we are going to insert the field “Account Number”. Right-click the mouse and select “*Insert SIMSII Database Field*” from the popup menu or strike <F10>. Select the Field “Account Number” from the “Available SIMS II DataBase Fields”.

Now “Construction Window” should look something similar to Figure 15.

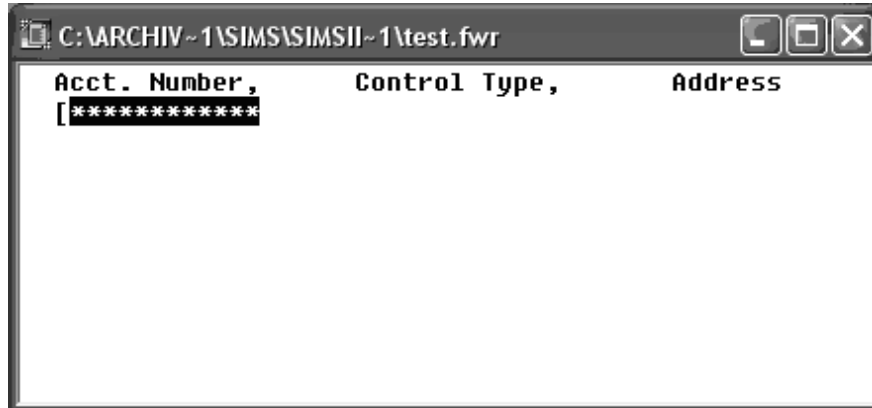


Figure 15 - Construction Window

The chain of asterisks represents the field inserted and its longitude it is equal to the field longitude. Click anywhere on the construction window in order to show the cursor and write the character comma “,”. Now place (using <Space Bar>) the cursor below “Control Type” title and insert the “Account Control Type” field followed by the comma character “,”. See Figure 16.

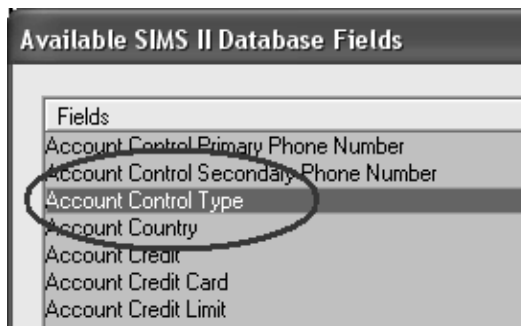


Figure 16 - Account Control Type Field

Now we are going to insert remaining fields (“Account Control Type” and “Account Address”) one by one following the same procedure. The FormWriter syntaxes require us to insert the “Account End Listing Block” next to the last field inserted. This field is represented by this character: “]”.

After inserting all fields, “Construction Window” should look very similar to Figure 17:

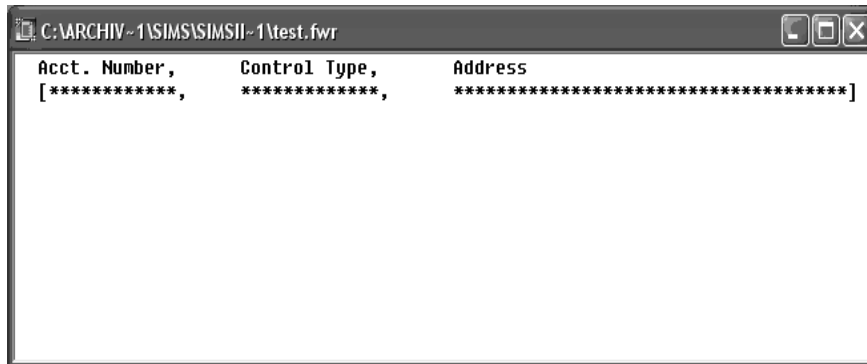


Figure 17 - Progress of test.fwr

Step #8.

Now that the report format is complete it is necessary to perform a building process. During this process FormWriter runs a check on the report format syntaxes. Right-click the mouse and select “Build Report” from the popup menu or press <F9>. See Figure 18.

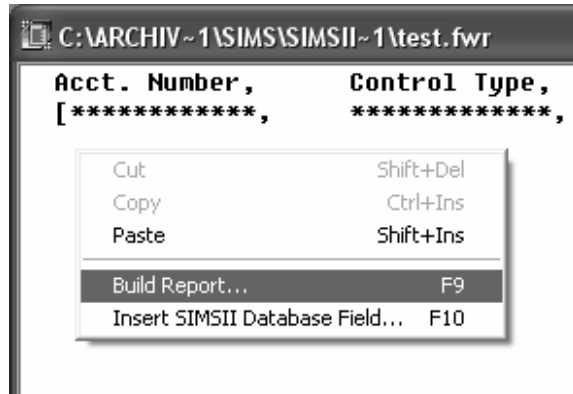


Figure 18 - Building the Report

Once the process is done, FormWriter will show the results in a window titled “Message”. If everything went right, the window should look something like Figure 19.

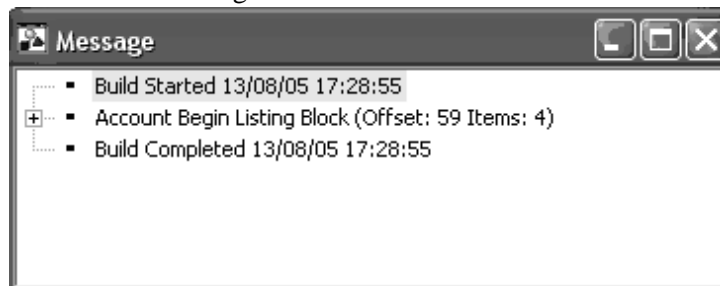
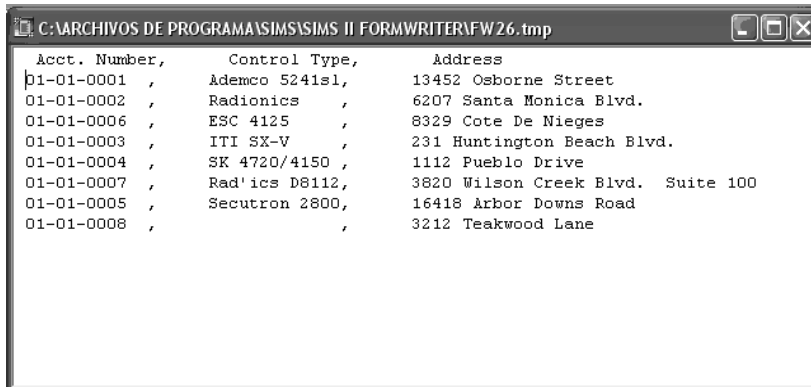


Figure 19 - Report Built

You can save the report format using: “File → Save”.

Now that your new report format is ready, you will be able to use it to schedule and generate reports just like you do with any of the report formats included with FormWriter.

Next figure shows you the result of running this report format for the account number range 01-01-0001 to 01-01-9999 of the SIMS II Demo Version.



Acct. Number,	Control Type,	Address
01-01-0001 ,	Ademco 5241s1,	13452 Osborne Street
01-01-0002 ,	Radionics ,	6207 Santa Monica Blvd.
01-01-0006 ,	ESC 4125 ,	8329 Cote De Nieges
01-01-0003 ,	ITI SX-V ,	231 Huntington Beach Blvd.
01-01-0004 ,	SK 4720/4150 ,	1112 Pueblo Drive
01-01-0007 ,	Rad' ics D8112,	3820 Wilson Creek Blvd. Suite 100
01-01-0005 ,	Secutron 2800,	16418 Arbor Downs Road
01-01-0008 ,	,	3212 Teakwood Lane

Figure 20 - Report Generated Using "test.fwr"

Since we included a comma character separating the columns of our report format, it is really easy to open the report from a Spread Sheet like Excel after saving it as a text file. The next Figure shows the result of open the report in Excel.

	A	B	C
1	Acct. Number	Control Type	Address
2	01-01-0001	Ademco 5241sl	13452 Osborne Street
3	01-01-0002	Radionics	6207 Santa Monica Blvd.
4	01-01-0006	ESC 4125	8329 Cote De Nieges
5	01-01-0003	ITI SX-V	231 Huntington Beach Blvd.
6	01-01-0004	SK 4720/4150	1112 Pueblo Drive
7	01-01-0007	Rad'ics D8112	3820 Wilson Creek Blvd. Suite 100
8	01-01-0005	Secutron 2800	16418 Arbor Downs Road
9	01-01-0008		3212 Teakwood Lane
10			

Figure 21 - Report exported to Microsoft Excel

Example #2: How to Create an Historical Report Format.

In this section we are going to give an example about how to create an historical report format. This report format will contain show these fields: Account Number, Reception date of the event, Event's priority, Zone number, Zone description and disposition used to complete the event.

Note: Before trying to follow this example we highly recommend to read and understand previous example because many procedures are similar.

Step #1

Select "Report From" from the FormWriter Menu:
"File → New → Report Form"

Step #2

Type the name you want to give to your new report format and click Open button. FormWriter will create a file with that name and an extension "fwr".

In this example we are going to name our report format as "history".

Step #3

A window titled as "Report Form Information" will show up. From the list "Report type" select the option "Event Detail Report". The field "Description" allows you to type any comment about the report format that you are creating (this field is optional). Click the OK button.

Note: You can also select “Event Intermediate Report” or “Event Summary Report” (instead of “Event Detailed Report) depending on the type of report you want. The procedure will be exactly the same.

Step #4

The construction window will emerge. The first fields that we are going to insert are “Account Number” and “Account Name”. These fields are going to be placed in the upper part of the report. (Please see Example #1 on page 11 if you want to review procedures to insert fields).

We are going to fill in the upper part of the report a complete line with the character “-“. This will provide a separation line between the information of one subscriber and the next. Following the procedures described in the previous example, proceed to insert the fields (Account Number and Account Name) and to write the corresponding text. After doing this the construction window should look similar to next figure:

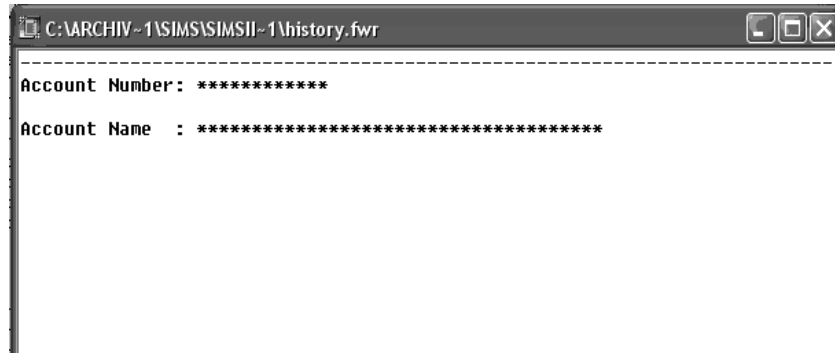


Figure 22 - Creating a report format

Step #5

In order to have a properly working report format, it is necessary to include the syntaxes field “History Event Detail Begin Block” (see image 23). This field represented by the character “[” will mark the beginning of the historical information. Insert this field at left most margin of the report form where you want to start the history output.

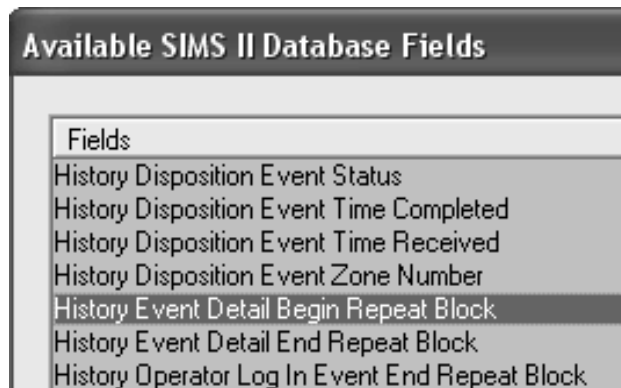


Figure 23 - Available SIMS II Database Fields

Now your construction window should look similar to Figure 24. Please note that we have drawn a red circle around the character for “History Event Detail Begin Repeat Block” just for clarity purposes.

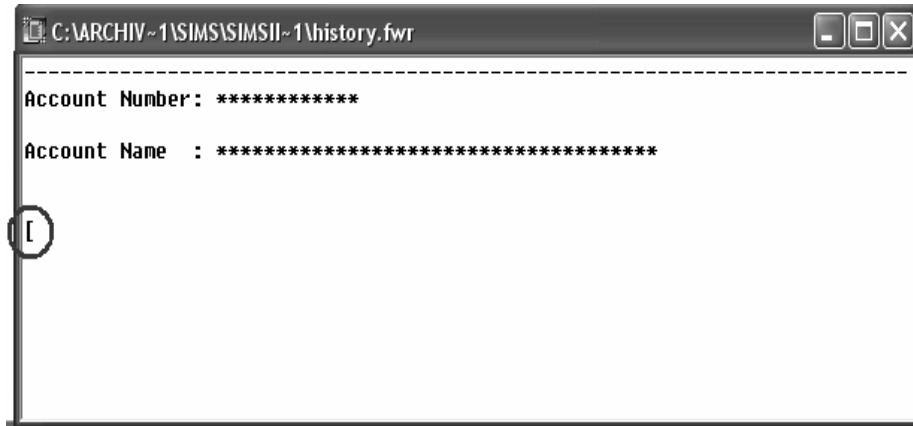


Figure 24 - History Event Detail Begin Repeat Block

Step #6

Now that we have marked the starting point of the history output we can insert the required fields. There are basically four types of fields that we can insert: Fields with information about the event, fields with information about the contact, fields with information about the operator who completed the event and fields with information about the disposition used to complete the event.

In each case it is necessary to insert syntaxes fields (“[”, “]”) marking the beginning and end of every type of fields. In this example we are going to insert fields with information about the event and fields with information about the disposition used to complete the event.

Before star inserting the fields with information about the event it is necessary to insert the syntaxes field “History Starting Event Begin repeat Block” (represented by the character “[”). Place it on the next line and a little bit to the right of “History Event Detail Begin Block”.

Right after “History Starting Event Begin repeat Block” field we are going to insert the next fields with some spaces between them: “History Starting Event Short Date Received”, “History Starting Event Signal Priority”, “History Starting Event Zone Number” y “History Starting Event Zone Description”. It could be convenient to add some titles to make the report easier to read.

Now we should insert the field “History Starting Event End Repeat Block” right after the “History Starting Event Zone Description”. This way we are establishing a limit for the Event related fields we just inserted. Construction window should look now like Figure 25.

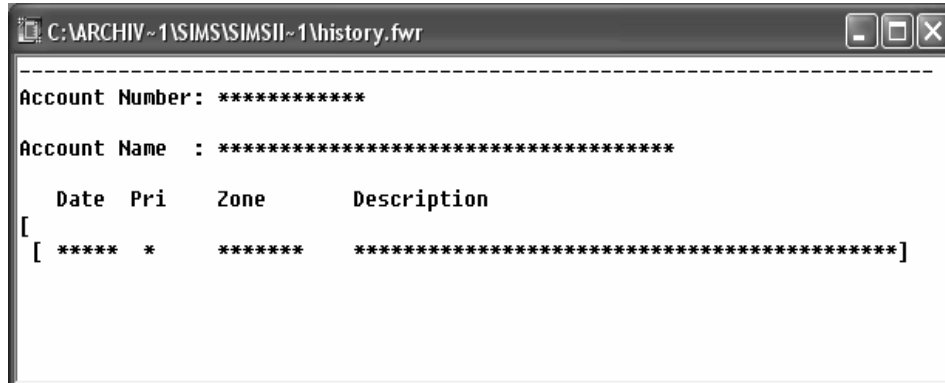


Figure 25 - Construction Window

Step #7

Since we want to show in our report the disposition used by the operator to complete the event, it is necessary to insert the “History Disposition Event Disposition”.

However, before doing that, we must insert the syntaxes character History Disposition Event Begin Repeat Block” field (represented by the character “[“). (Remember that these syntaxes characters allow you to mark the beginning and the end of every kind of fields)

FormWriter Syntaxes requires that “History Disposition Event Begin Repeat Block” field should be aligned with the “History Starting Event Begin Repeat Block”. (Please see Figure 26). Otherwise you will get an error message during the building process.

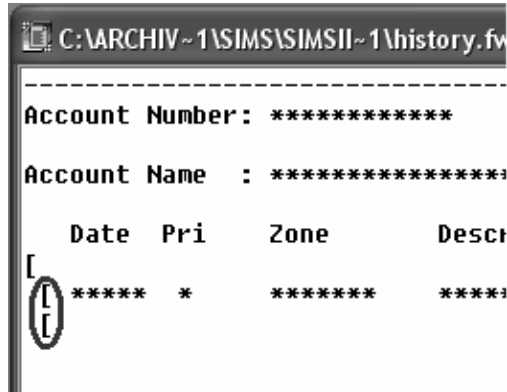


Figure 26 - Construction Window

Right after the “History Disposition Event Begin Repeat Block” you may want to write the title “Disposition” (This is not necessary but will give it a lot of clarity to your report).

Now we are going to insert the “History Disposition Event Disposition” field. This field will show us in the report the disposition used to complete the event.

Right after the “History Disposition Event Disposition” field we must insert the “History Disposition Event End Repeat Block”. This field will mark the end of “disposition related” fields.

Step #8

The last field we need to insert is the “History Event Detail End Repeat Block” field (represented by “]”) which is the complement of the “History Event Detail Begin Repeat Block” (inserted on Step #5) and will let FormWriter know where the history output ends. Place this field at right most margin of

the report form where you want to finish the history output.

The next image (Figure 27) shows the final appearance of the report format. We are going to show the different types of fields in different colors in order to make it easier to understand. The fields that mark the beginning and end of the history output are shown in red. The fields related to the event information (including their syntaxes fields) are shown in blue. The fields related to the disposition information (including their syntaxes fields) are shown in green.

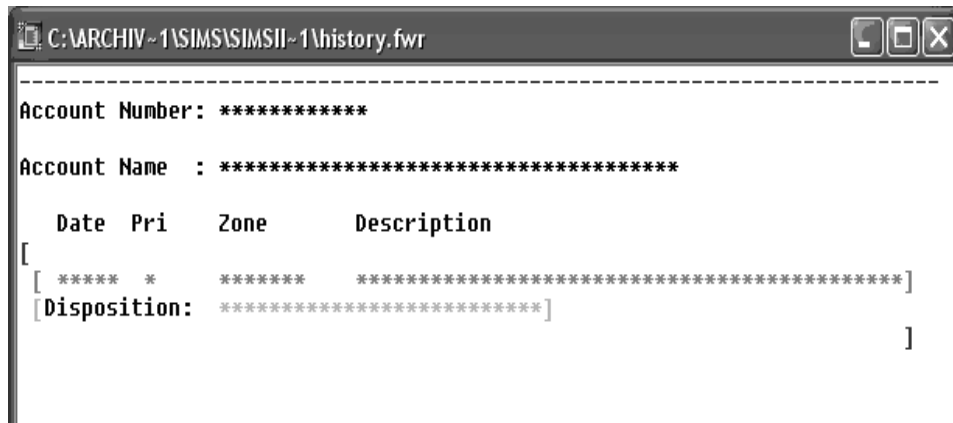


Figure 27 - Final appearance of report format

Step #9

Now that the report format is complete it is necessary to perform a building process. During this process FormWriter runs a check on the report format syntaxes. Right-click the mouse and select “Build Report” from the popup menu or press <F9>. Once the process is done, FormWriter will show the results in a Window titled “Message”. If everything is right the window should look something like Figure 28 next.

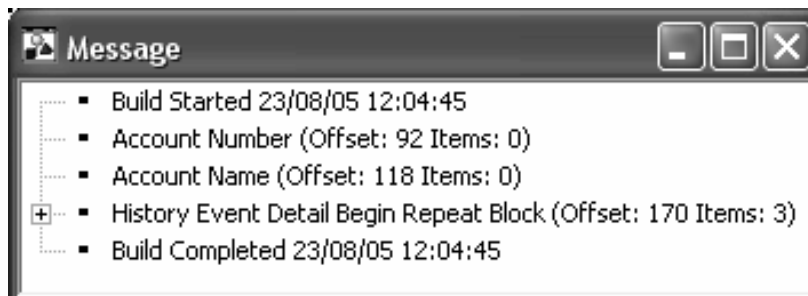


Figure 28 - Build Process Results

Now that your new report format is ready, you will be able to use it to schedule and generate reports just like you do with any of the report formats included with FormWriter.

See Figure 29 for an example of the output for this report format made for account 01-01-0001 and 01-01-0002 from SIMS II demo database.

```
-----  
Account Number: 01-01-0001  
  
Account Name : Tequila Willies  
  
Date Pri Zone Description  
01/07 1 1 Smoke Detector in Kitchen  
1 1 Smoke Detector in Kitchen  
1 1 Smoke Detector in Kitchen  
1 1 Smoke Detector in Kitchen  
Disposition: Placed Event On Hold  
6 1 Smoke Detector in Kitchen  
Disposition: Placed Event On Hold  
1 1 Smoke Detector in Kitchen  
Disposition: Event Priority Downgraded  
1 1 Smoke Detector in Kitchen  
Disposition: Event Priority Downgraded  
1 1 Smoke Detector in Kitchen  
Disposition: (a) Additional Alarm  
6 1 Smoke Detector in Kitchen  
|  
  
-----  
Account Number: 01-01-0002  
  
Account Name : Fibertec, Inc.  
  
Date Pri Zone Description  
05/07 5 Late to Close -  
Disposition: (f) Fire Dispatched
```

Figure 29 - Report Output for "history.fwr"

3. Editing a Report Format

FormWriter offers the possibility of modify any of the report formats. To do this, select the next function from the FormWriter Menu: *File* → *Open*

An Open Window will show up containing all the report formats available (“fwr” extension files). Select the one you want to edit and click the Open button. As an example we are going to open the file H-S-C.fwr (All Event Summary Report).

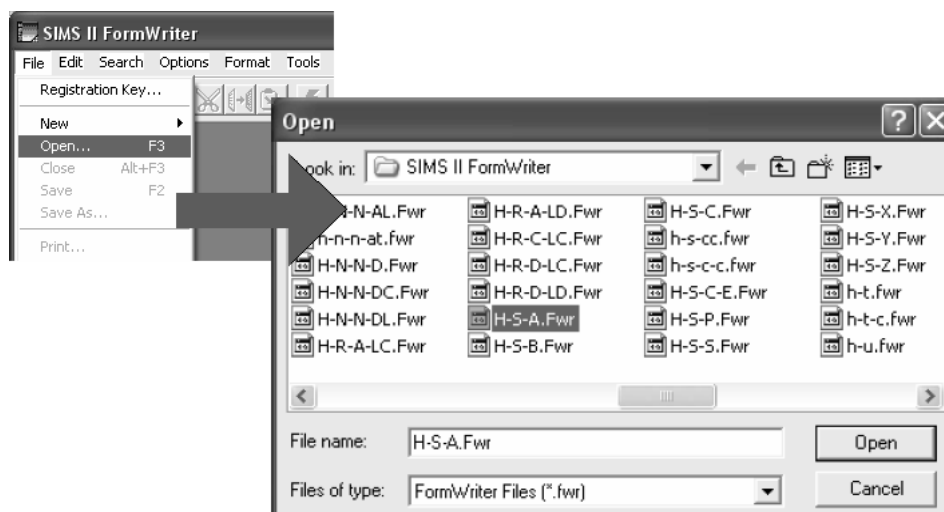


Figure 30 - Opening a Report Format

By doing this, a window with the report format will show up. In this window all the fields are represented by chains of asterisks. Beyond this point, you will be able to perform the different procedures explained so far in this document (Insert or delete a field, write text, etc). This way you will be able to adapt a report formats to your specific needs.

```

C:\ARCHIV-1\SIMS\SIMSII-1\H-S-C.Fwr
*****
*****
*****
Report Run Date: *****
Report Run Time: *****
***** Cl: ***

***** Report Message *****
*****
*****
*****
*****
***** Report Legend *****
Date : Month/Day mm/dd
Day : Day of the Week
Recvd : Received Time
Cmplt : Completed Time
Code : Event Code
Msg : Event Type
Desc : Description
User : User Info
Begin : ***** at *****
Until : ***** at *****

----- Fold Here -----
All Events Summary
*****
*****
-----
DATE DAY RECVD CODE MSG DESCRIPTION (USER INFORMATION)
-----
***** ** ***** ***** **
End of Report...

```

Figure 31 - H-S-C Report Format

If you want to identify the name of the field represented by a chain of asterisks, simply place the cursor on it and FormWriter will show you the name of the field on the bottom of the screen (as shown in the next image):

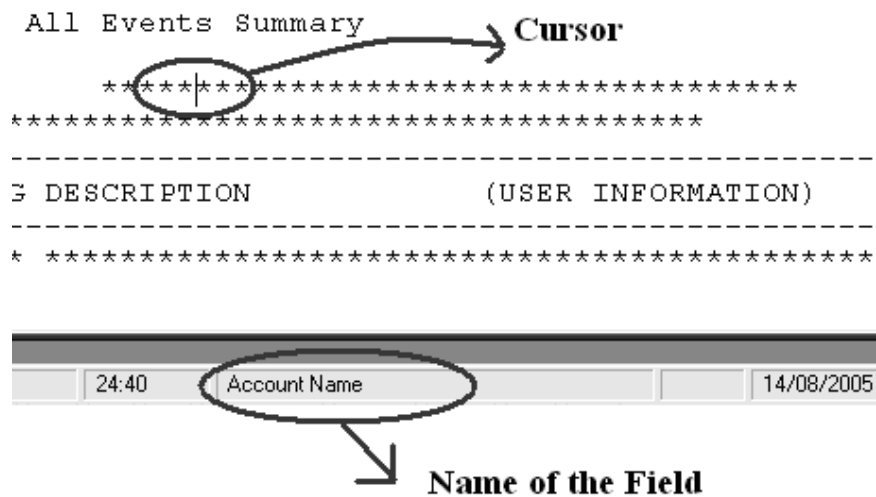


Figure 32 – How to Identify a Field Name

***Note:** You should perform a Build process after any modification if you want it to take effect.*

***Note:** We highly recommend saving the modified reports with a different name, so you won't lose the original report format.*

Note: In order to delete a field already inserted in a report format you simply should place the cursor at the beginning of the field and press <Delete>. A confirmation window will appear asking you if you really want to delete the field. Click the “Yes” button.

4. Scheduling a Report

In this section we are going to explain the procedure to follow in order to schedule a report for automatic generation. This way you can schedule certain reports to run at regular intervals with automatic emailing or faxing of the report to sites or dealers as required

Step #1: Starting

Make a right-click on “All Scheduled Report” window and select “Add Scheduled Report...” from the pop-up menu (See figure 33). You can also select “File → New → Scheduled Report”.

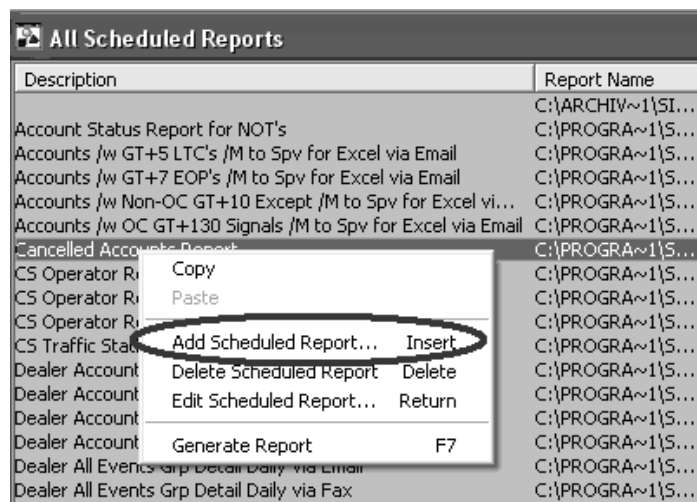


Figure 33 - Adding a new scheduled report

Step #2: Selecting the type of report you want to schedule.

A Open Dialog Box will show up. Choose the report format (“fwr” extension file) you want to use and click “Open”. Please note that file names of report formats show the path you should use in SIMS II for DOS to generate that report.

For instance “H-S-A.fwr” will allow you to schedule an “All Events Detail Report”. This report is generated in SIMS II through */Historical Reports Menú/Subscriber Reports Menu/All Events Detail/*.

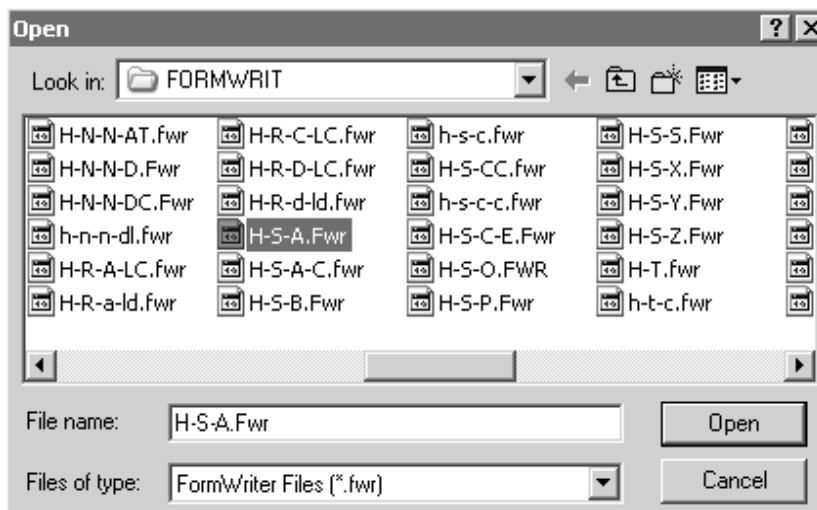


Figure 34 - Selecting Type of Report

Step 3: Schedule Report

After selecting type of report you want, “Schedule Window” will show up (please see Figure 35). There are several items you need to setup here:

The 'Schedule Report' dialog box contains the following elements:

- Calendar:** A grid showing months (Jan-Jun, Jul-Dec) and days (Sun-Sat). Radio buttons are used to select a date. The date '5' is selected under 'Fri'.
- Generate at End of Month:** A checkbox labeled 'Generate at End of Month'.
- Report Interval:** Radio buttons for Yearly, Monthly (selected), Weekly, Daily, and Hourly.
- Frequency:** A list box with values 1 through 8.
- Date Interpretation:** Radio buttons for Absolute (selected) and Day of month.
- Generate At:** A text box with a browse button (...).
- Report Description:** A text box.
- Report Information:**
 - Name: C:\ARCHIV~1\SIMS\SIMSII~1\H-S-A.Fwr
 - Type: Event Detail Report
 - Start generation: 05/08/2005
 - Next generation: 05/09/2005
 - Last form update: 22/08/2003
 - Description: Subscriber All Events Detail Report
- Buttons:** OK, Cancel, Help, and Parameters...

Figure 35 - Schedule Report Window

- **Calendar:** Select date from which you want to start generating report.
- **Generate at End of Month:** Check this box if you want to generate the report at the end of the month. Note that this will force “Report Interval” as Monthly.

- **Date Interpretation:** Allows you to specify whether the Start Generation date should be interpreted as an absolute or day of the month value.

Select “**Absolute**” if you want “Start Generation Date” to be a specific **date** of the month. For instance: January first, August 15, etc.

Select “**Day of the Month**” if you want “Start Generation Date” to be a specific **day** of the month: First Monday of the Month, Third Friday of the Month, etc.

- **Report Description:** This field allows you to enter a brief description about the report you are scheduling. What you enter here is what you will see under “Description” at “All scheduled report” Window.
- **Generate at:** The Generate At field allows you to specify, in military time, the generation time. This field does not format itself, so you must enter the time with the format hh:mm:ss (Ex. 08:00:00).

Note: Multiple reports can have the same Generate At value.

Warning: A report should not be running during a SIMSII file regeneration (C-S-Z) or a sort (C-D-Z).

- **Report Interval/Frequency:** These fields allow you to specify how often the report will be generated. First select Report Interval you want to apply (Yearly, Monthly, Weekly, Daily or Hourly).

Next select Frequency you want to apply to Report Interval (Frequency must be between 1 and 99).

Examples:

If you want to schedule your report for automatic generation every two months then select a Report Interval of “Monthly” and a Frequency of 2.

If you want to schedule your report for automatic generation every 3 days then select a Report Interval of “Daily” and a Frequency of 3.

Step 4: Other Parameters

Click on “Parameters” button from “Schedule Report” Window (see Figure 35). Parameters Window will show up (see Figure 36).

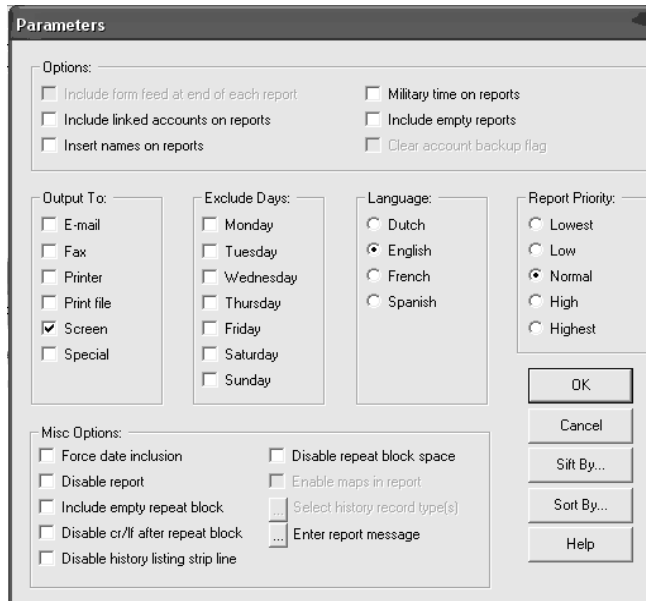


Figure 36 - Parameters Window

Here is a description of the fields you must set up at this window:

- **Options:**

- **Include Linked Accounts on Reports:**

- Allows you to specify whether to included accounts that are linked (e.g., backup, Notify, or Zone) to the host account in the host account's database printout.

- **Insert Names on Reports:** Allows you to specify whether user names will appear on open/close reports.

Note: A contact name must be entered on page three in Account Maintenance

with a corresponding user number in the "Usr" column for the name to appear on a report.

Military Time on Reports: Allows you to specify whether event times will appear in 24 hour military notation (e.g. 2:00 p.m. would be 14:00) instead of the normal a.m. or p.m. method.

Include Empty Reports: Allows you to specify whether accounts that have no activity should be included on historical reports.

- **Output to:** Allows you to specify destination of the report once that has been generated. For more detail about options available, please see Section 5 “routing a report” on Page 52
- **Exclude days:** Check days in which you don’t want the report to be generated. (For instance: You want to generate a report only at weekdays. In this case you will need to select a report interval of “Daily” (see page 41 for information about this parameter) and you will have to check Saturday and Sunday from “Exclude Days”.
- **Language:** Allows you to select the language for titles and headers on the report.
- **Report priority:** Allows you to set up priority level for the report. Reports with a higher report priority will get more processor time and will therefore complete quicker.

- **Misc. Options.**

Force Date Inclusion: Check this box to force FormWriter to include event's date for every event on a report.

Disable Report: Check this box if you want FormWriter to stop generating the report automatically.

Include empty repeat block: If you select this option, FormWriter will fill empty fields with empty repeat blocks. This way report format will keep its shape.

Disable cr/lf Alter Repeat Block: Check this box to disable CR/LF (Carriage return/Line Feed) that appears after some fields.

Disable History Listing Strip Line: Check this box if you want to disable the heading line that appears on some reports (The purpose of this line is to provide separation between one customer information and the next one).

Enable Maps in Reports: Enable printing of certain types of reports

Enter Report Message: Allows you to introduce up to four lines of text to be included in the report.

Step 5: Sift by Parameters

Click “Sift by” button on Parameters Window. “Sift by” windows will show up (See Figure 37)

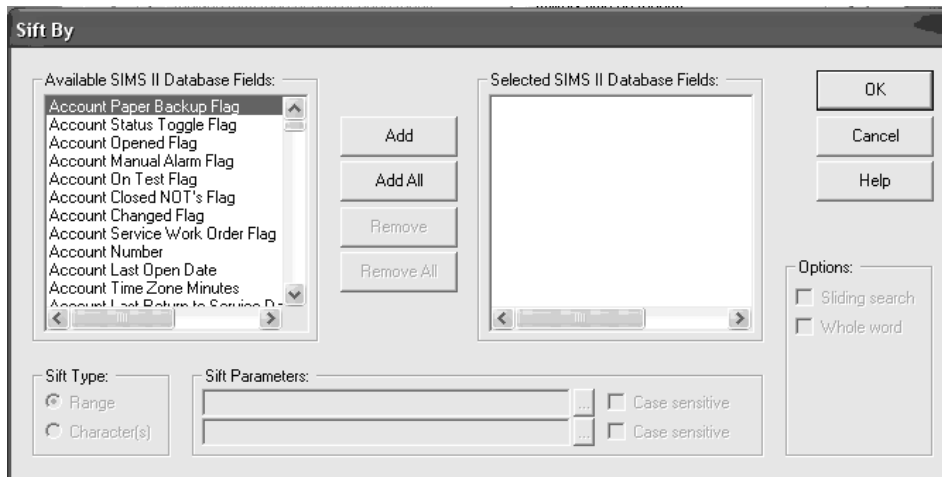


Figure 37 - "Sift By" Window

From this window you will be able to specify sift parameters to use on this scheduled report. Available SIMS II Database Fields depend on the type of report selected in step #2.

- **Available SIMS II Database Fields and Selected SIMS II Database Fields**

In order to use a field as a sift parameter, you will have to selected it from Available SIMS II Database Fields and then make click on “Add” button.

All selected fields will appear under “Selected SIMS II Database Fields”. How many fields do I need to add? It all depends on how you want to sift your report.

For instance: you want to run your report for a certain range of accounts. In this case you are going to need to include “Account Number” as a sift parameter.

Now, lets say you want to be more specific including only account with a specific zip code. In this case you will have to add “Account Zip Code” too.

You can keep adding fields in order to make your report as specific as you want.

To define values for every one of the fields from “Selected SIMS II Database Fields” just click on it and proceed with Sift Parameters, Sift Type and Options.

- **Sift Type.**
Use the Sift Type parameters to determine how to interrupt the **Sift Parameters**. You must choose between “Range” and “Characters”.

Range: field allows you to specify that this sift item is looking for a range of values specified in Sift Parameter Field1 and Sift Parameter Field2.

Example1: Perform a sift on the Account Name field with Sift Parameter Field1 having a value of ‘New’ and Sift Parameter Field2 having a value of ‘Tequila’. Therefore, if an account had an Account Name of ‘South’, this account would evaluate as true and will

be included on the report. Conversely, if the account had an Account Name of 'Utlely', it would evaluate as false and won't be included on the report.

Example2: Perform a sift on the Account Number field with Sift Parameter Field1 having a value of '01-01-0030' and Sift Parameter Field2 having a value of '02-01-0001'. Therefore, if an account had an Account Number of '01-01-2000', this account would evaluate as true and will be included on the report. Conversely, if the account had an Account Number of '02-01-0200', it would evaluate as false and won't be included on the report.

Character(s): The Characters field allows you to specify that this sift item is looking for certain characters specified in Edit Field 1.

Example: Perform a sift on the Type Coding Field 1 with Sift Parameters Field1 having a value of 'W'. Therefore, if an account had a Type Coding Field 1 of 'W', this account would evaluate as true and will be included on the report. Conversely, if the account had a Type Coding 1 value of 'S' it would evaluate as false and won't be included on the report.

- **Case Sensitive:** The Case Sensitive field allows you to specify for the sift item of the specified SIMSII database field a case sensitive string compare.
- **Sliding Search:** Allows you to specify whether the entire SIMSII database field will be searched for the value specified by Sift Parameters Field. If you do not specify this option, the search will look at the beginning of the SIMSII database field for a match.

Note: Using this option forces the Sift Type to Characters.

- **Whole Word:** This field allows you to specify whether the value specified by Edit Field 1 must be a whole word. If you do not specify this option, the value in Edit Field 1 may be part of another word.

Note: Using this option forces the Sift Type to Characters.

Step 5: Sort by Parameters

Click “Sort by” button on Parameters Window. “Sort by” dialog box will show up (See Figure 38)

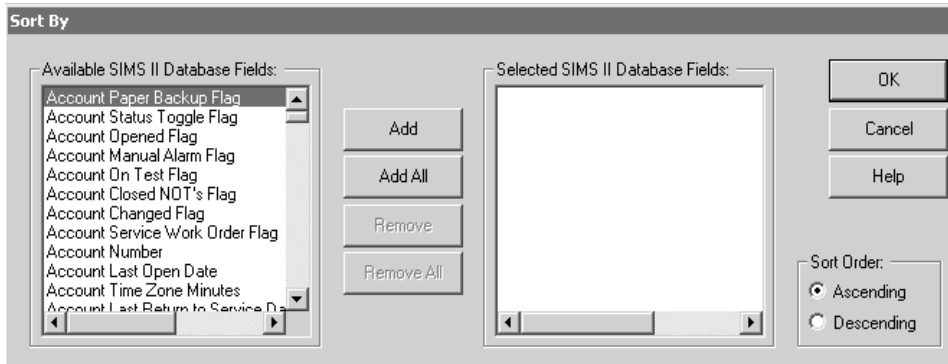


Figure 38 - Sort By Window

The Sort By dialog box allows you to specify sort entries for this report. You will be able to select which fields you want to use as a sort criteria.

To add a field just follow the same procedure described on Step#4 for adding sift by fields. The order in which the entries appear in the Selected SIMSII Database Fields list box is the order in which the accounts will appear on the report.

- **Sort Order:**

Ascending: The Ascending field will sort the items from the lowest to the highest ASCII values.

Descending: The Descending field will sort the sort items from the highest to the lowest ASCII values.

Step 6: Final Step

Now that the setup is done, click on the “Ok” Button from “Parameters Window” on the “Schedule Report” Window.

Now the new scheduled report should be available at “All Scheduled Report Window”. Remember that information entered on “Report Description” field will be shown under “Description” title on the “All Scheduled Report Window”.

5. Routing a report

FormWriter offers you several alternatives to route a report once is completed. We are going to explain next how to setup every one of those options.

The screenshot shows the 'Parameters' dialog box with the following sections:

- Options:**
 - Include form feed at end of each report
 - Military time on reports
 - Include linked accounts on reports
 - Include empty reports
 - Insert names on reports
 - Clear account backup flag
- Output To:** (Circled in red)
 - E-mail
 - Fax
 - Printer
 - Print file
 - Screen
 - Special
- Exclude Days:**
 - Monday
 - Tuesday
 - Wednesday
 - Thursday
 - Friday
 - Saturday
 - Sunday
- Language:**
 - Dutch
 - English
 - French
 - Spanish
- Report Priority:**
 - Lowest
 - Low
 - Normal
 - High
 - Highest
- Misc Options:**
 - Force date inclusion
 - Disable repeat block space
 - Disable report
 - Enable maps in report
 - Include empty repeat block
 - Select history record type(s)
 - Disable cr/lf after repeat block
 - Enter report message
 - Disable history listing strip line

Buttons on the right: OK, Cancel, Sort By..., Sort By..., Help.

Figure 39 - Route options for a report

E-mail:

Check this option if you want FormWriter to send completed report by E-Mail. Right click and select E-Mail Options from the pop-up menu. "E-mail Options" dialog box will show up (see next Figure).



Figure 40 - "E-mail Options" Dialog Box

- **Mail To:** The Mail To field allows you to specify the recipients of the e-mail message

If you press the Mail To button, a list displaying the entries from the E-Mail Address Book will appear. To add an item from this list to the Mail To field, press the To button. Additionally, entry of this field is not optional.

- **Send Report As:** Use the Send Report As parameters to specify how the report should be sent with the e-mail message.

Text: The Text field allows you to specify that the report should be sent as text.

Note: If form feeds are included on the report, you will have to send the report as an attachment to preserve them.

Attachment: The Attachment field allows you to specify that the report should be sent as an attachment.

Note: If form feeds are included on the report, you will have to send the report as an attachment to preserve them.

- **E-Mail Book:** Click this button to gain access to Form Writer E-Mail directory.

Fax:

Check this option if you want FormWriter to send completed report by Fax. Right click and select Fax Options from the pop-up menu. "Fax" dialog box will show up (see next Figure).

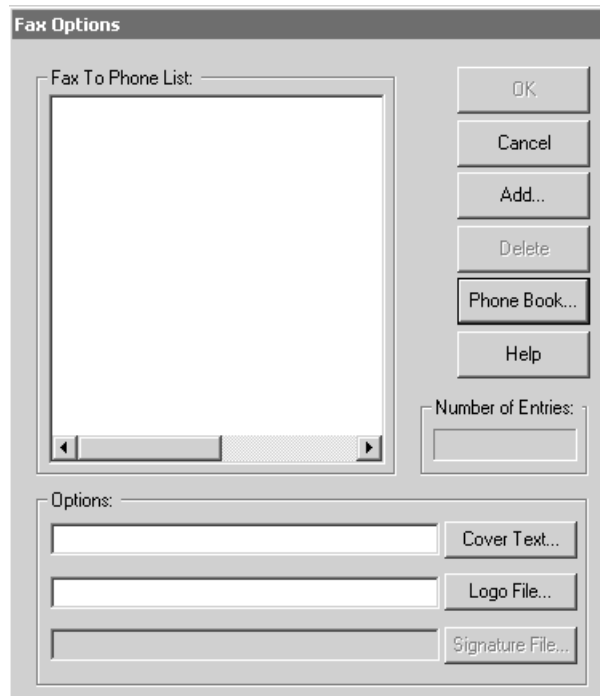


Figure 41 - "Fax Options" Dialog Box

- **Fax to Phone List:** The Fax To Phone List field allows you to specify the recipients of the fax.

If you press the Add button, a list displaying the entries from the Fax

Phone Book will appear. To add an item from this list to the Fax To Phone List field, press the To button. Additionally, note that this field is not optional.

- **Options:**

Cover Text: The Cover Text field allows you to specify an ASCII text file that contains the text that is to appear on the fax cover page. This field is optional.

Logo File: This field allows you to specify a BMP or PCX formatted file that is to be displayed as the cover page logo. This field is optional.

- **Phone Book:** Click this button to gain access to Form Writer E-Mail directory.

Printer

The Printer field allows you to specify that the completed report be sent to the specified printer.

Print File

Check this option if you want FormWriter to send completed report to a file. Right click and select Print File Options from the pop-up menu. "Print File Options" dialog box will show up (see next Figure).

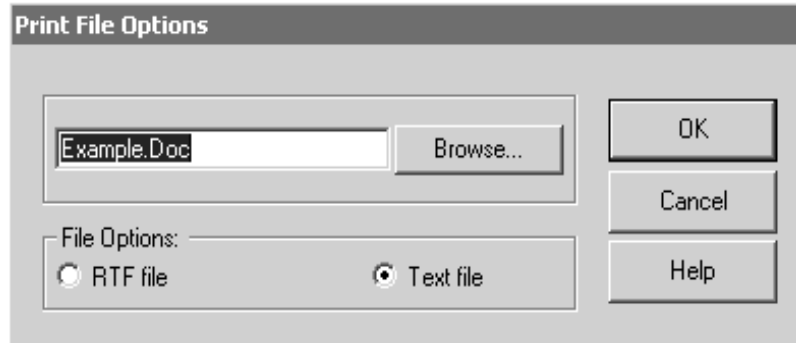


Figure 42 - "Print File Options" Dialog Box

From this dialog box you will be able to specify the name of the print file.

- **File Options:**

RTF File: The RTF radio button allows you to specify that the file should be create in an RTF format.

Text File: The Text radio button is used to tell the FormWriter program to create an ASCII text formatted print file.

Screen

The Screen field allows you to specify that the completed report be display on the screen. The file displayed on the screen will be a RTF formatted file.

Special

This option will allow you to send completed reports to E-mail accounts and fax numbers from SIMS II account database or SIMS II dealer database. This way you won't need to make changes in both SIMSII and FormWriter Database.

Right click and select Special Options from the pop-up menu. "Special Options" dialog box will show up (see next Figure).

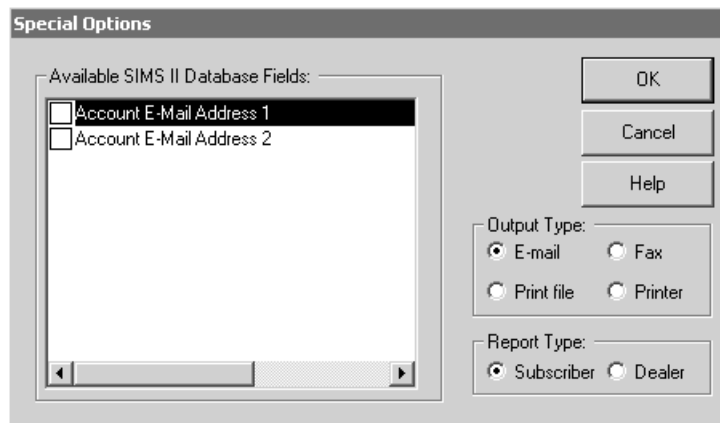


Figure 43 - "Special Options" Dialog Box

The SpeciaOptions dialog box allows you to specify how a group of subscriber reports should be sent. You can either send them out individually or combine them by group and send them out.

- **Available SIMSII Database Fields:** Contains a list of SIMSII database fields that you can use to choose where FormWriter will get either the e-mail address or fax number that all completed reports will be sent to.
- **Output Type:** Use the Output Type parameters to specify where the completed report should be routed.
- **Report Type:** Use the Report Type parameters to specify how to separate the reports. Please note that selecting “Subscriber” as “Report Type” will make available Account E-mail address or fax numbers. On the other hand, selecting “Dealer” as “Report Type” will make available Dealer E-mail address or fax numbers

6. FormWriter Setup

Before start using FormWriter there are several items you need to setup. In order to do this, go to *Options* → *Setup* on FormWriter's Menu. Setup Dialog Box will show up (see next Figure).

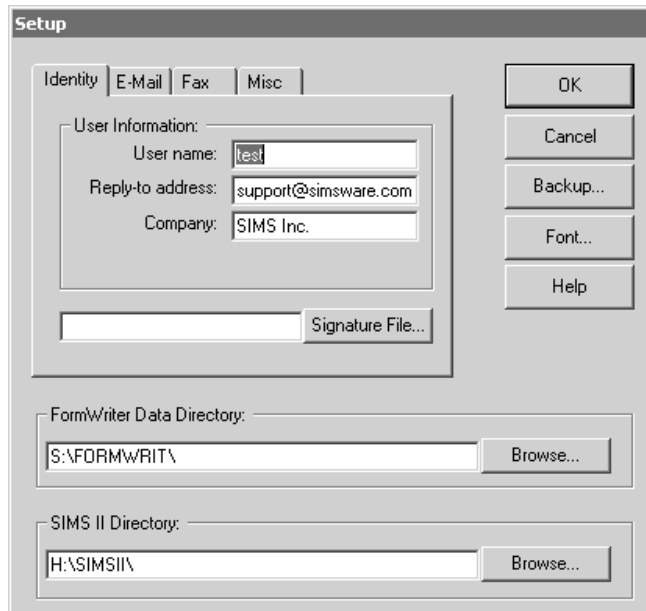


Figure 44 - "Setup" Dialog Box

If you are planning to send reports by E-mail you will need to set up E-mail Tab. If you are planning to send reports by Fax you will need to set up Fax Tab.

FormWriter Data Directory

The FormWriter Data Directory field allows you to specify the drive and directory that the FormWriter program should read and write its data to.

When FormWriter is initially installed, this entry defaults to the drive and directory that the FormWriter program is installed to.

SIMS II Data Directory

Since FormWriter needs to access SIMS II database, we must specify the drive and directory of the SIMS II database in this field.

When FormWriter is initially installed, the SIMS II Drive and Directory defaults to 'C:\SIMSII\'.

Identity

From this tab (see next Figure) you will be able to introduce information regarding to the identity of the person/company that registered the FormWriter program.

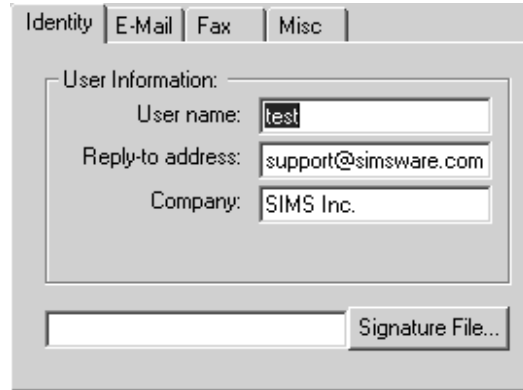


Figure 45 - Identity Tab from "Setup Dialog Box"

- **User Name:** Identifies the person FormWriter is registered under.
- **Company:** Identifies the company FormWriter is registered under.
- **Reply-to-Address:** Allows you to specify an e-mail address you want unsent mail returned to.
- **Signature File:** Allows you to specify an e-mail signature file to append to all e-mail messages sent from the FormWriter program.

E-Mail

From this tab you will be able to setup FormWriter to send E-Mails. See next Figure.

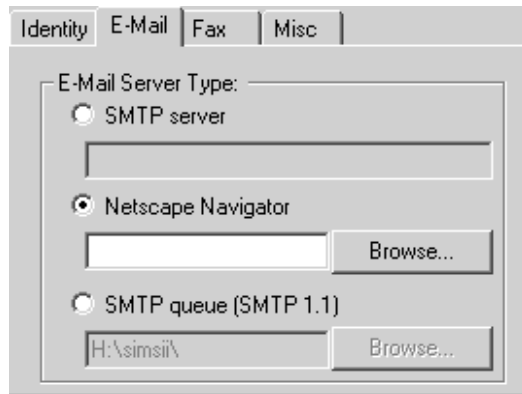


Figure 46 - E-mail Tab from “Setup Dialog Box”

The SMTP Server

The SMTP Server field allows you to specify that all e-mail messages be sent via a SMTP (Simple Mail Transfer Protocol) Server.

SMTP is a protocol used by Internet mail servers to communicate with each other. The FormWriter program will send all e-mail messages to the SMTP mail server specified by the SMTP Server Name. Contact your Network Administrator to find out your SMTP Server Name.

Netscape Navigator

This field allows you to specify that all e-mail messages will be sent via Netscape Navigator.

The FormWriter program will write all e-mail messages to the directory specified by the Netscape Navigator Directory.

When using this protocol, e-mail will not be sent until the user connects to the Internet and selects the command File | Send Messages in Outbox or strikes Ctrl+H. Contact your Network Administrator to find out your Netscape Navigator Path.

The SMTP Queue (SMTP v1.1)

This field allows you to specify that all e-mail messages will be sent via a SMTP v1.1 compatible device. This could include either the SIMS ComServer or another proprietary program. The FormWriter program will write all e-mail messages to the directory specified by the SMTP Queue (SMTP v1.1) Directory. Contact your Network Administrator to find out your SMTP Queue (SMTP v1.1) path.

Fax

From this tab you will be able to setup FormWriter to send E-Mails. See next Figure.

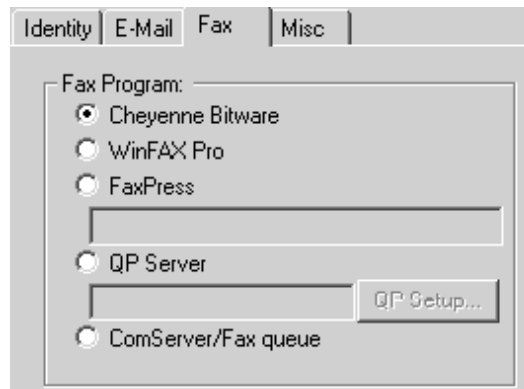


Figure 47 - Fax Tab from "Setup Dialog Box"

- **Cheyenne Bitware Client:** This field allows you to specify that faxes from FormWriter will be sent via Cheyenne FaxServe. This Windows fax program is installed and ran on a network server.

The Cheyenne Bitware Client must be installed and running on the local workstation for FormWriter to send faxes.

- **WinFAX Pro:** This field allows you to specify that all faxes be to be sent from FormWriter via FaxPress. The FormWriter program will write all faxes to the FaxPress Directory where the FaxPress program will send them out.
- **FaxPress:** Press field allows you to specify that all faxes be to be sent from FormWriter via FaxPress. The FormWriter program will write all faxes to the FaxPress Directory where the FaxPress program will send them out.

The FaxPress Directory allows you to specify the drive and directory that the FormWriter program should write the FaxPress files to.

- **QP Server:** The QP Server field allows you to specify that all faxes be to be sent from FormWriter via QP Server. Click on the button to the right of this radiobutton to display the QP Server Setup dialog box that allows you to configure the QP Server protocol. This is a Windows faxing program that is installed and ran on a network server.

Note: The QP Server print driver must be installed on the local machine.

- **Fax Queue:** This field allows you to specify that all faxes will be sent from FormWriter via a fax queue compatible device. An example of this is SIMS ComServer. Please consult the SIMS ComServer help for additional information on this subject.

Miscellaneous

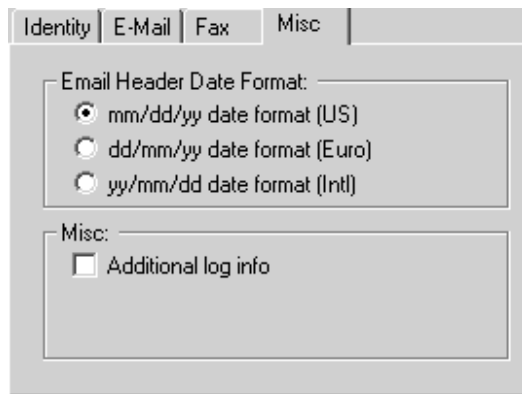


Figure 48 - Misc Tab from "Setup Dialog Box"

- **E-Mail Header Date Format:** This field allows you to specify format date for Email Header.
- **Additional Log Info:** For certain diagnostic purposes, SIMS technical staff may ask you to check this box. Otherwise must be unchecked.

Backup

This is a very important feature that will allow you to make an automatic Backup of your report formats and scheduled reports.

The screenshot shows a dialog box titled "Backup". It features a checked checkbox for "Enable Automatic Backup". Under the heading "Day(s) of Week:", all days from Sunday to Saturday are checked. To the right, the "Start backup date/time:" is set to "01/02/07" and "08:37:14", while the "Last backup date/time:" field is empty. Below this is the "Last Backup Location:" field, which is also empty. At the bottom, there are three buttons: "OK", "Cancel", and "Backup".

Figure 49 - Backup Dialog Box

You will need to check “Enable Automatic Backup” to make use of this feature. Next you will have check those days of the week when you want FormWriter to do the backup procedure.

You also will need to enter a “Start Backup date/time”.

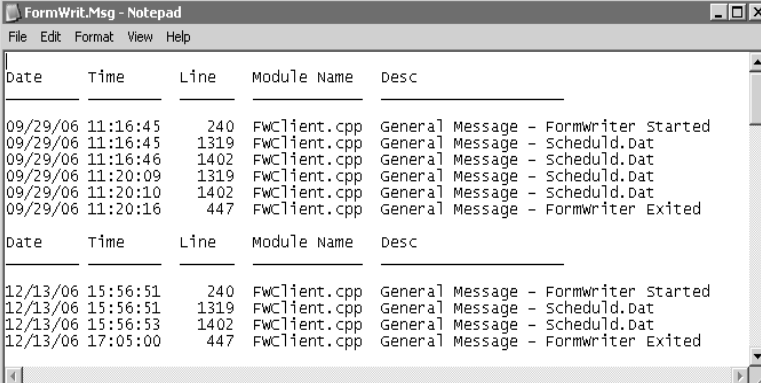
If you want to make a Backup copy right away,
you can press “Backup” button.

7. Tools Menu

We are going to describe in this section functions and procedures available from Tools Menu in FormWriter.

View Message/Error Log

This log allows you to view any message/error produced by the FormWriter program during report generation. The name of the file is FormWrit.Msg. The file will be displayed on your current text file editor as shown on Figure 50



```
FormWrit.Msg - Notepad
File Edit Format View Help

Date      Time      Line      Module Name  Desc
-----
09/29/06 11:16:45    240  FwClient.cpp  General Message - Formwriter started
09/29/06 11:16:45    1319 FwClient.cpp  General Message - Scheduld.dat
09/29/06 11:16:46    1402 FwClient.cpp  General Message - Scheduld.dat
09/29/06 11:20:09    1319 FwClient.cpp  General Message - Scheduld.dat
09/29/06 11:20:10    1402 FwClient.cpp  General Message - Scheduld.dat
09/29/06 11:20:16    447  FwClient.cpp  General Message - Formwriter Exited

Date      Time      Line      Module Name  Desc
-----
12/13/06 15:56:51    240  FwClient.cpp  General Message - Formwriter Started
12/13/06 15:56:51    1319 FwClient.cpp  General Message - Scheduld.dat
12/13/06 15:56:53    1402 FwClient.cpp  General Message - Scheduld.dat
12/13/06 17:05:00    447  FwClient.cpp  General Message - Formwriter Exited
```

Figure 50 - "FormWrit.msg" Log file

View Send Log

This log allows you to view a summary list of all e-mail, fax, and print jobs send from FormWriter. The name of this file is FormWrit.Log. The file will be displayed on your current text file editor as shown on next Figure.

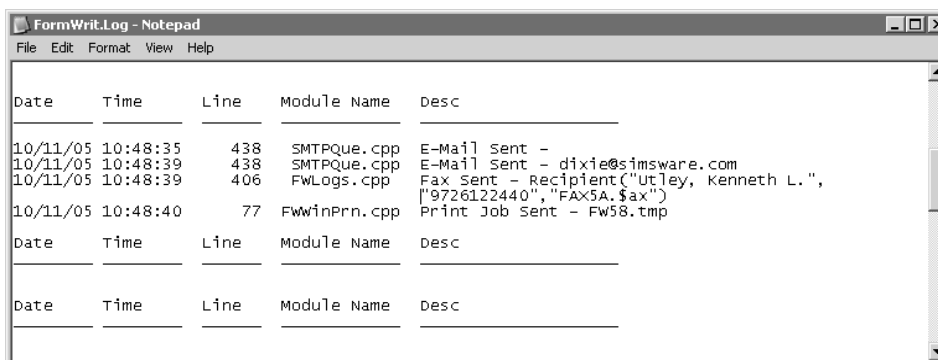


Figure 51 - "FormWrit.log" Log File

View Scheduled Reports

This selection allows you to view detailed information of all scheduled reports with a text editor.

When you select this option, your current file editor will display the content of FormWrit.txt file.

8. Scheduled Reports Examples

In this section we are going to show some examples of how you should set up a scheduled report for different situations.

First we are going to explain the kind of report desired and then we will show the values you should set up for every parameter.

Irrelevant Parameters will not be described. For details about the meaning of every parameter, please see section four “Scheduling a Report” on page 38.

Example #1.

An “All Events Detail Report” to be send automatically by e-mail the first Monday of every other month (a bi-monthly report) at 10:00a.

This report should include all the accounts within the range 01-01-0001 and 03-01-4000 with the word “Central” in the “Account Name” Field. The account should also belong to the Account Group Acme.

The report should cover last two months of account’s activity prior to reports date generation,

Report Format: H-S-A.fwr

Schedule Report Parameters

- **Date Interpretation:** Day of Month
(Check Monday 1st).
- **Generate At:** 10:00:00
- **Report Interval:** Monthly
- **Frecuency:** 2
- **Output to:** E-Mail

Sift by Parameters to add

- **Account Number:**
Sift parameter1: 01-01-0001
Sift parameter2: 03-01-4000
Sift Type: Range
- **Account Name:**
Sift Parameters: Central
Sift Type: Character
Options: Sliding Search
- **Account Group**
Sift Parameters: ACME
Sift Type: Character
Options: Whole Word

- **History Starting Event Short Date Received**

Sift parameter1: Current date – 2 month(s).

Sift parameter2: Current Date

Sift Type: Range

Note: Please observe that we are selecting “Dynamic Values” for the sift parameters instead of fixed dates. This way we don’t have to change this parameter every time that the report is generated.

Example #2.

A “Disposition of Event Report” (H-D from SIMSII) to send automatically by fax every three weeks starting January 1 at 4:00p.

It should include all the accounts with a periodic test between 1 and 10 hours. It should include all the events finished with “Additional Alarm Disposition”.

Report Format: H-D.fwr

Schedule Report Parameters

- **Date Interpretation:** Absolute (Check Jan 1)
- **Generate At:** 04:00:00
- **Report Interval:** Weekly
- **Frecuency:** 3
- **Output to:** Fax

Sift by Parameters to add

- **Account Test Every**
Sift parameter1: 1
Sift parameter2: 10
Sift Type: Range
- **Account Test Every Interval**
Sift Parameter: H
Sift Type: Character.
- **History Disposition Event Disposition**
Sift Parameter: Additional Alarms (you have to select this value from a list).
Sift Type: Character

Example #3.

An “Event Type Detail Report” for accounts with a “G” in the field “Account Type Coding 1” for costumers located in Plano, TX.

This report should be include BUR and PAN signals and should be send to the printer every other day.

Report Format: H-E-D.fwr

Sift by Parameters to add

- **Account Type Coding 1**
Sift Parameter: 1
Sift Type: Character
Options: Whole word.

- **Account city**
Sift Parameter: Plano
Sift Type: Character
Options: Whole Word.
- **Account State**
Sift Parameter: TX
Sift Type: Character
Options: Whole Word
- **History Starting Event Zone Mnemonic**
Sift Parameter: Check BUR and PAN (You have to select this value from a list).
Sift Type: Character