

# Incident Report App Guide

- **Creating a PDF template**

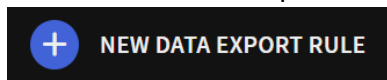
1. Create your app by adding forms, pages and widgets in Snap IDE
2. Click on Data Connection Rules in the left panel



3. Select Data Export from the top panel



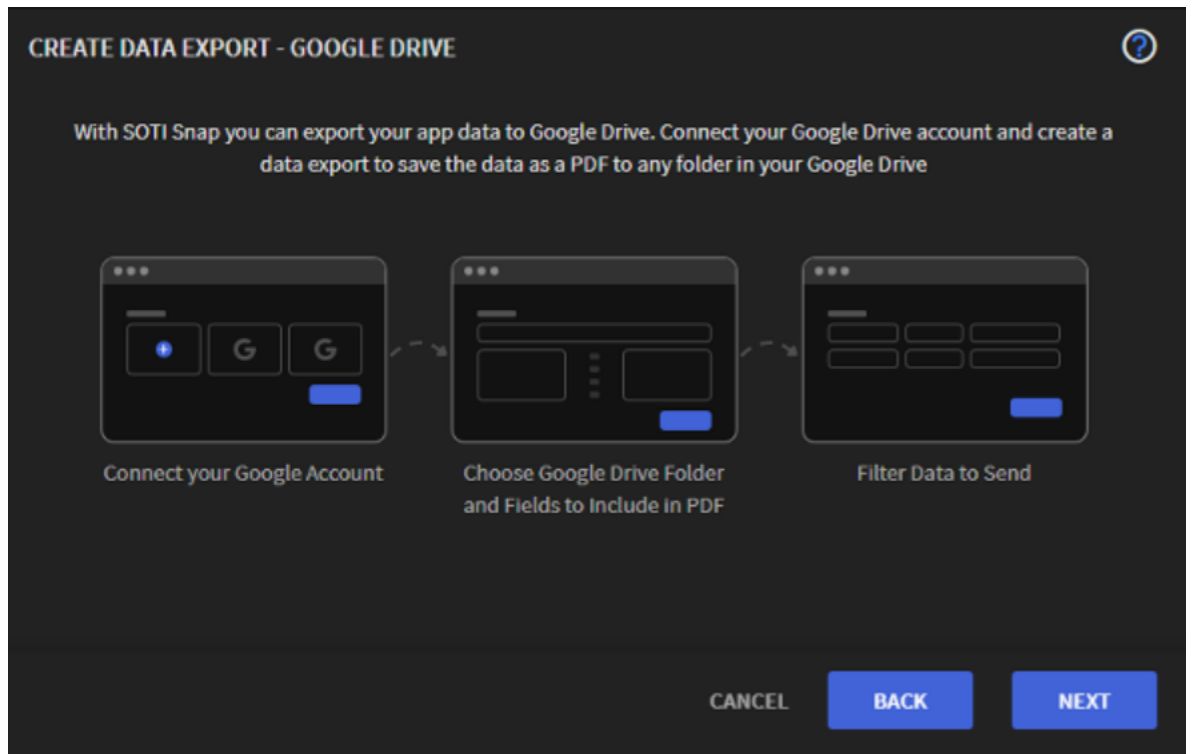
4. Click on New Data Export Rule in the top right corner



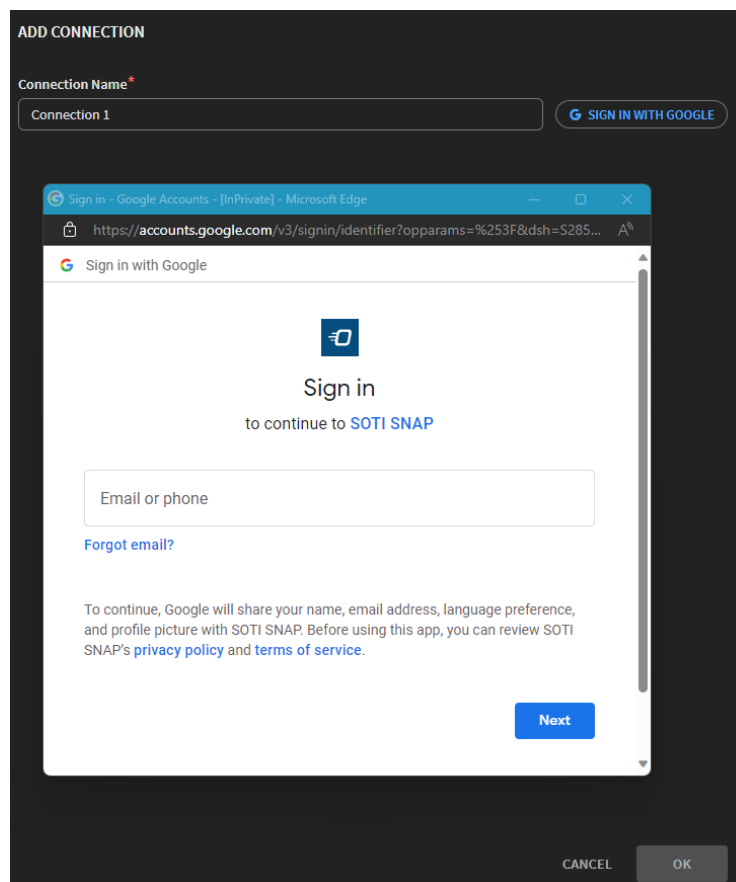
5. Enter a name (ex. Google drive) and select a destination. Let's choose Google drive for this example and click next

A dark-themed form titled 'CREATE DATA EXPORT'. It has a 'Name\*' field with 'Google Drive' entered. Below it is a 'Select a destination\*' section with a grid of eight options: Google Drive (checked), Snap Link, SharePoint, OneDrive, FTP/SFTP, WebHook, Gmail, and Email. At the bottom right are 'CANCEL' and 'NEXT' buttons.

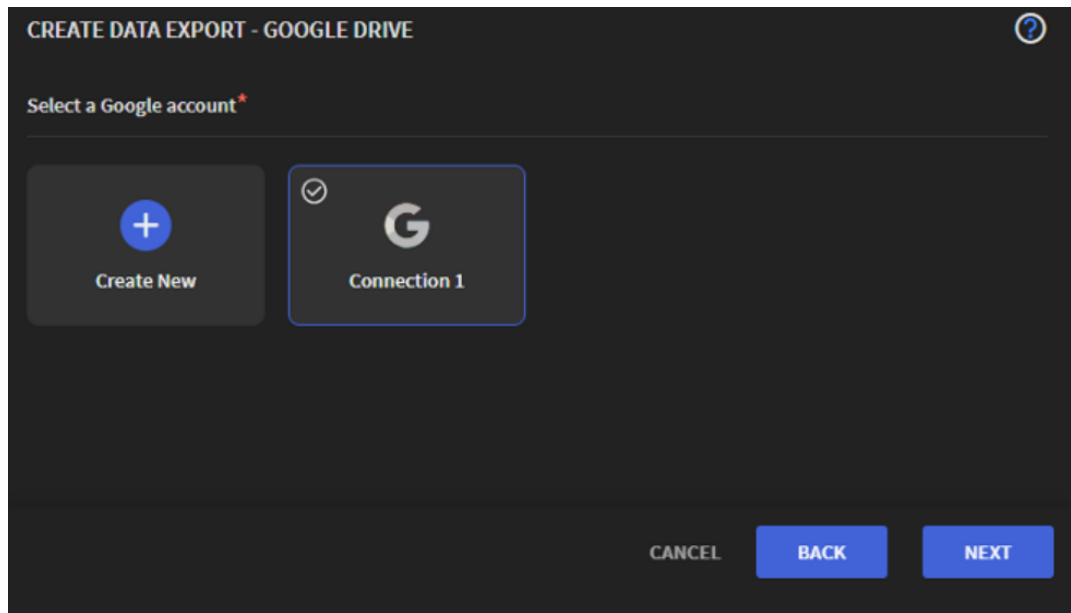
6. Read the instruction and click next when done



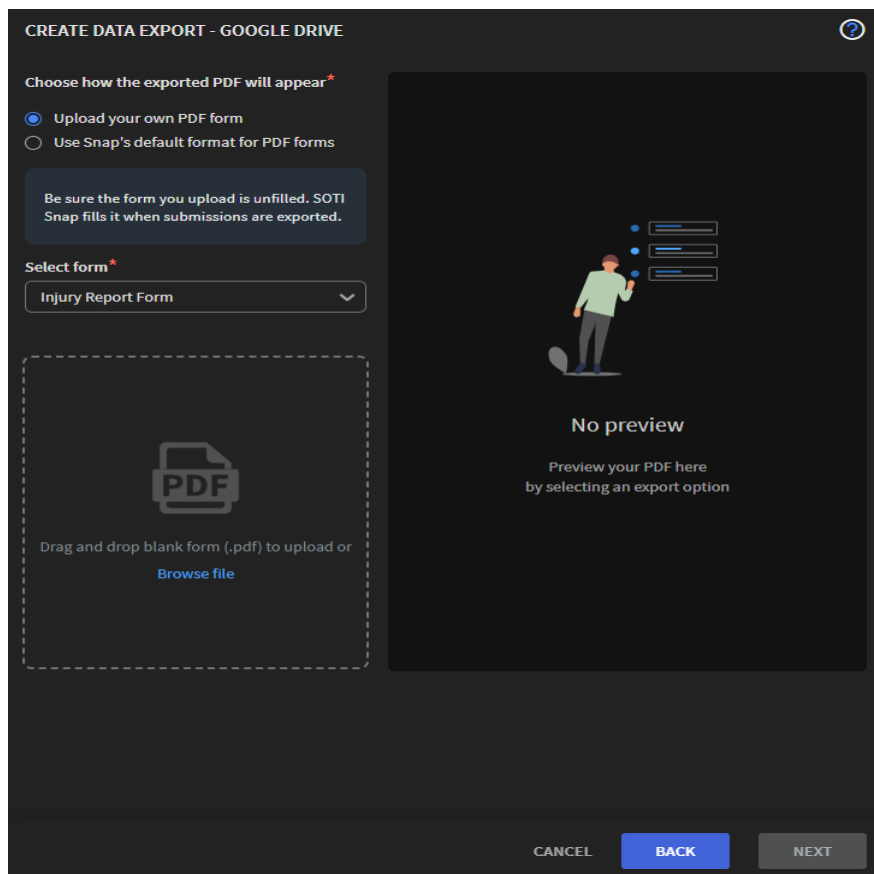
7. Click on create new card, enter a connection name and click on sign in with Google



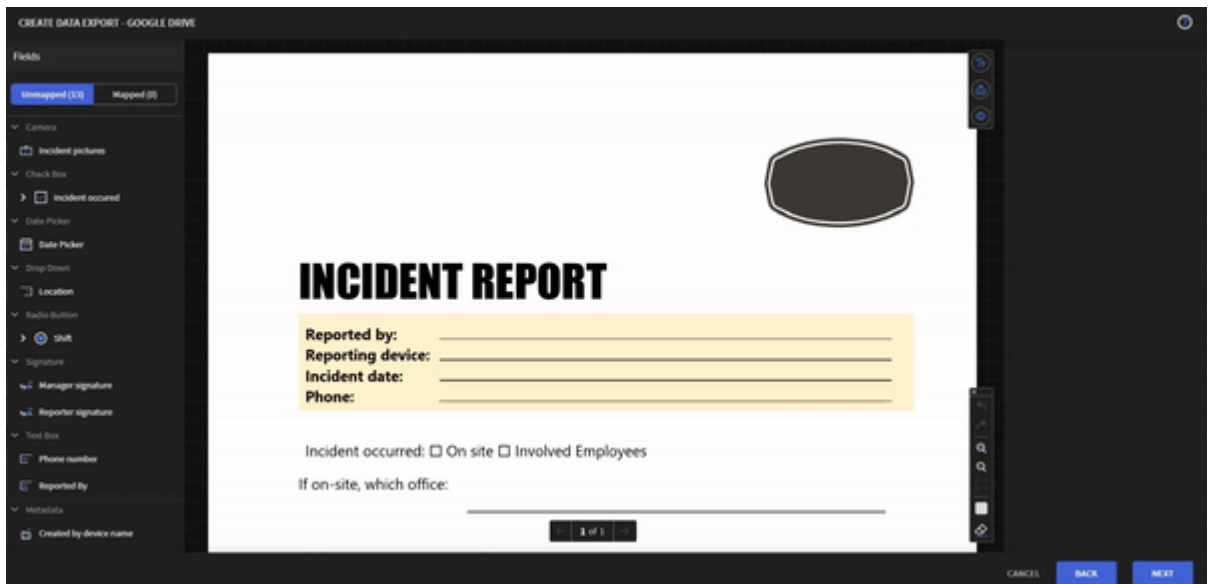
8. Enter your Gmail credentials and authenticate your account then click ok
9. A new card will be created. Click next to continue



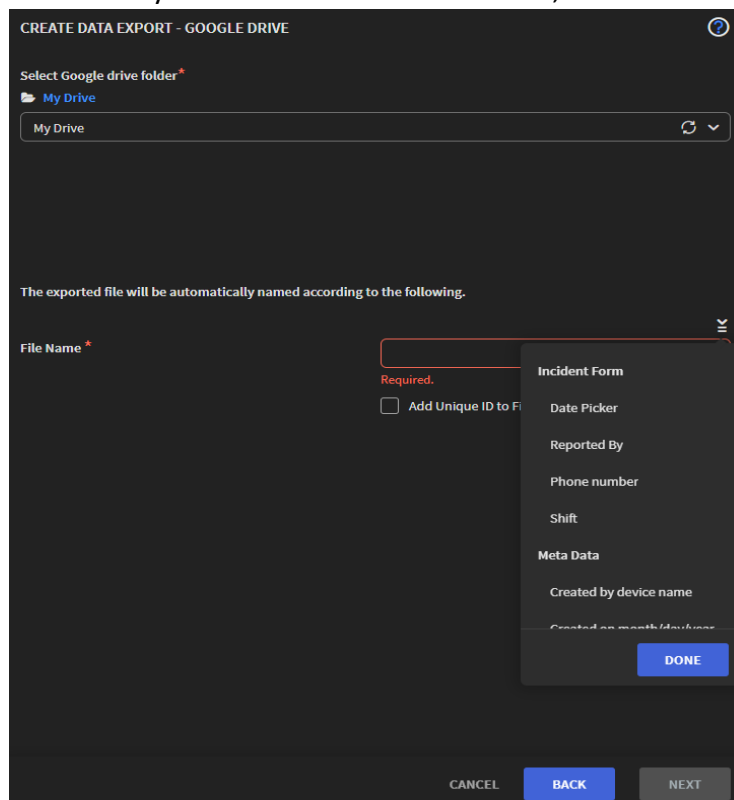
10. Select the option 'Upload your own PDF form'. Select the Snap form which you will be submitting data from. Click on browse file and select the desire PDF to be mapped



11. After the upload is completed, the PDF preview will be displayed. The left panel contains all the widgets and metadata fields
12. You can map the widgets and metadata fields to the PDF. Once done, click next



13. Now select the google drive folder where you want the PDF to be saved. Enter a file name for the PDF, you can use widgets and metadata fields as the file name via the dropdown icon. You can also add a unique id to the file name to mitigate duplicate names. Once you are content with the name, click next



CREATE DATA EXPORT - GOOGLE DRIVE ?

Select Google drive folder\*

My Drive

The exported file will be automatically named according to the following.

File Name\* ||<

Preview: REPORTED BY.pdf

Add Unique ID to File name ?

CANCEL BACK NEXT

14. Users will have the choice to export all records or limit certain records to be exported by using “Filter Records”

CREATE DATA EXPORT - GOOGLE DRIVE ?

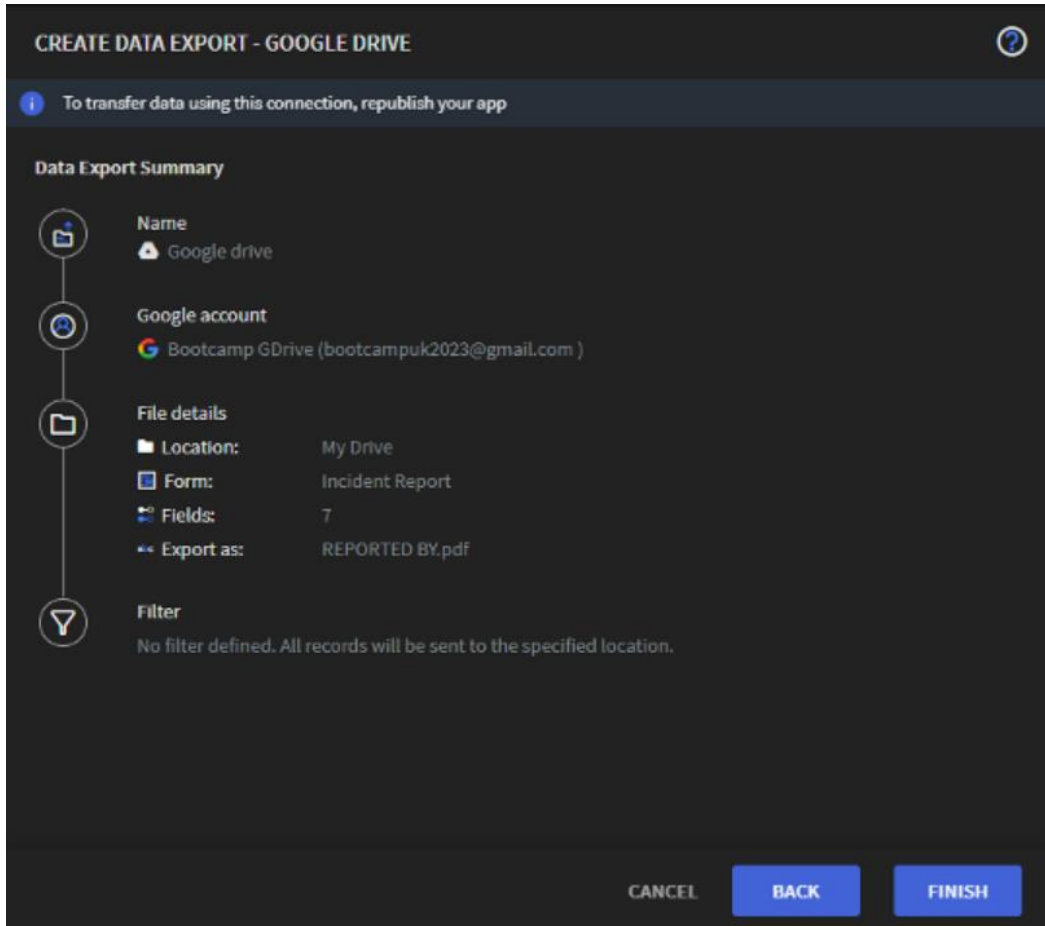
Include records to export

Every new record  Filter Records

Export & delete  
Delete all records from the SOTI Snap server and devices after the data has been pushed to the external server.

CANCEL BACK NEXT

15. A data export summary is displayed. Click finish once summary is reviewed. User can navigate to the previous wizard via the back button and make edits where necessary. Click on cancel to discard changes or save the template as draft



16. A new data connection rule (Google drive) was created

