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





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

CREATE DATA EXPORT			
Name*		Google Drive	
Select a destination*			
Google Drive	2 Snap Link	SharePoint	OneDrive
↑↓ FTP/SFTP	e WebHook	Gmail	Email

6. Read the instruction and click next when done

CREATE DATA EXPORT - GOOGLE DRIVE	?
With SOTI Snap you can export your app data to Google Drive. Connect your Google Drive account and creat data export to save the data as a PDF to any folder in your Google Drive	ea
Connect your Google Account Choose Google Drive Folder Filter Data to Send and Fields to Include in PDF	
CANCEL BACK NE	хт

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

ADD CONNECTION		
Connection Name*		
Connection 1	G SIGN	I IN WITH GOOGLE
Sign in - Google Accounts - [InPrivate] - Microsoft Edge	- 0	×
https://accounts.google.com/v3/signin/identifier?opparams=%253F&	dsh=S285	A
G Sign in with Google ₹ □		
Sign in		
to continue to SOTI SNAP		
Email or phone		
Forgot email?		
To continue, Google will share your name, email address, language pref and profile picture with SOTI SNAP. Before using this app, you can revie SNAP's privacy policy and terms of service.	erence, w SOTI	
	Next	Ţ
	CANCEL	

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

CREATE DATA EXPORT - GOOGLE DRIVE					
Select a Google account*					
Create New	⊘ G Connection 1				
		CANCEL	ВАСК	NEXT	

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		0
Select Google drive folder*		
My Drive		C ~
The exported file will be automatically named according to	o the following.	
Eile Name *		¥
File Name	Required.	Incident Form
	Add Unique ID to Fi	Date Picker
		Reported By
		Phone number
		Shift
		Meta Data
		Created by device name
		Created on month (doubleor DONE
	CANCEL	BACK

CREATE DATA EXPORT - GOOGLE DRIVE		0
Select Google drive folder*		
My Drive		C ~
The exported file will be automatically named according to	the following.	
		¥
File Name * Preview: REPORTED BY odf	%REPORTED BY%	
	Add Unique ID to File name ①	
	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				
Inc	ude records to export			
۲	Every new record	 Filter Records 		
	Export & delete Delete all records from the SOTI Snap server and devices	after the data has been pu	shed to the external so	erver.
		CANCEL	ВАСК	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

CREATE	CREATE DATA EXPORT - GOOGLE DRIVE						
🕕 To tran	To transfer data using this connection, republish your app						
Data Exp	ort Summary						
	Name Soogle drive						
Ó	Google account						
Y	G Bootcamp GD	rive (bootcampuk2023@gmail.com)					
	File details						
Ť	Location:	My Drive					
	Form:	Incident Report					
	Fields:						
	Export as:	REPORTED BY.pdf					
(v)	Filter No filter defined. All records will be sent to the specified location.						
		CANCEL BACK FINIS	ян				

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

≡.	Incident Report App (1.0.2)					
	REST API	DATA SOURCE	DATA EXPORT	GLOBAL VARIABLES	XSIGHT LIVE VIEW TOPICS	
	DATA CONNECTION RULES		All (1)	Active (1) Inactive (0)		
*	NAME		STATUS		FORM	
	: 🔥 Google drive					