DV3111 – ViewPoint Reports

Scope   Outline the general purpose of each report, demonstrate how to run reports, and outline the information provided by the standard ViewPoint reports as well as the available filters.

Purpose   ViewPoint comes with seven standard reports that can be used to gather, and export data that the ViewPoint system collects.

Applicable User Groups   All Users (Administrator, Group Administrator, General User)

Requirements   User must be logged into the system and assigned to a group that has Assets assigned to the group as well.

Reports
1. Corrective Action History (DV3111A)
2. Readings History (DV3111B)
3. Current Readings (DV3111C)
4. Summary Report (DV3111D)
5. Audit Log (DV3111E)
6. System Configuration (DV3111F)
7. Calibrations (DV3111G)

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Process

Step 1	From the ViewPoint home screen, navigate to the **REPORTS** menu and select the report you wish to view.	

Results: This brings up the report screen. For this example, the Corrective Action History report is used. The process is the same for most other reports. See the sections below for details on the differences between the reports and reporting options.

Step 2	Select an Asset group from the Group dropdown.	
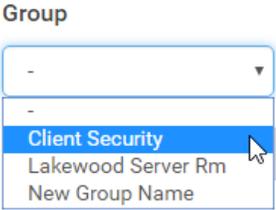
Results: The report will generate with Assets from the selected group.

Step 5	To export the report to either a PDF or Excel file, click the corresponding button.	

Results: results

Note: The Current Readings, Audit Log reports do not have the option to export as PDF or excel file. See below for information on report differences including report specific filters.

Reports

In the below sections demonstrate the different filters and options available for each report as well as show an example of the report.

Corrective Action History Report

The Corrective Action History report shows the alarms for a selected period and any user actions taken to resolve them.

The report contains the following fields:
1. Alarm ID (system assigned, unique)
2. Alarm Time
3. Asset (Customizable Name)
4. Location
5. Cause (User entered value)
6. Alarm Value (The reading that triggered the alarm state)
7. Status (Open/Closed)
8. Updated Time (Time the alarm state was updated, either by being triggered or most recent user action)
9. User (Last user act on the alarm, or "System" if no user action has been taken)

1.	**Option:** Filter the report by selecting a date range from one of the pre-defined time periods.	6h 12h **1d** 2d 1w 1m

Results: The adjusted date range and displayed data will refresh and show data based on the time frame selected.

2.	**Option:** Filter the report by entering a custom date range.	FROM January 1, 2017 1:14 PM TO January 2, 2017 1:14 PM

Results: The adjusted date range and displayed data will refresh and show data based on the custom date range.

3.	**Option:** Filter the data to show data from one Asset at a time by selecting a specific Asset from the Asset Name dropdown.	**Asset Name** All Assets ▼ All Assets AA17882 - Server Rm Water Leak AA010234 - Blood D5-1 (Ref)

Results: The data will refresh and show data for the selected Asset only. If you click specific alarm, the field will expand to show you details regarding this alarm (all information will be displayed when exporting this report)

Corrective Action History

[Create PDF Report] [Create Excel Report]

Group   **Asset Name**

[Client Security ▾]   [All Assets ▾]

[6h] [12h] [1d] [2d] [1w] **[1m]**   FROM [February 28, 2017 8:41 AM] TO [March 31, 2017 8:41 AM]

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Alarm Id ⇕	Alarm Time ▾	Asset ⇕	Location ⇕	Cause ⇕	Alarm Value ⇕	Status ⇕	Updated Time ⇕	User ⇕
10920	10/24/2016 1:36 AM	D5:1-Air Sensor (CP-14)	E&TC	Temperature below standard limit of 24.00 C since 2016-10-24 06:06:00Z.	24.00	Closed	03/20/2017 9:35 AM	aslinkard (Andrew Slinkard)

Corrective Action History Report Example

Reading History

The Reading History report shows all the readings for a given period and is grouped per Asset.

The report contains the following fields:
1. Time (time the reading was taken)
2. Reading type/ Standard Range (this label varies depending on the sensor type and the normal range set for the specific input: Temperature, Humidity, Differential Pressure, etc.)

Note: The readings that fall outside the normal range set for the input will be highlighted in Orange.

1.	**Option:** Filter the report by selecting a date range from one of the pre-defined time periods.	[6h] [12h] **[1d]** [2d] [1w] [1m]

Results: The adjusted date range and displayed data will refresh and show data based on the time frame selected.

2.	**Option:** Filter the report by entering a custom date range.	FROM [January 1, 2017 1:14 PM] TO [January 2, 2017 1:14 PM]

Results: The adjusted date range and displayed data will refresh and show data based on the custom date range.

3.	**Option:** Filter the data to show data from one Asset at a time by selecting a specific Asset from the Asset Name dropdown.	**Asset Name** All Assets ▼ All Assets AA17882 - Server Rm Water Leak AA010234 - Blood D5-1 (Ref)

Results: The data will refresh and show data for the selected Asset only.

4.	**Option:** Show data from Disabled Assets by ticking the Include Disabled Assets and Inputs option.	☑ Include Disabled Assets and Inputs

Results: The data will refresh and show data including disabled assets.

Readings History

Reading History Report Example

Current Readings Report

The Current Reading report shows the current readings for a selected group. The report is designed to fit into a workflow that requires frequent whole system health checks (e.g. a workflow requiring twice daily reading checks for the whole system). The report displays all current readings and highlights any that are outside the customizable acceptable range. The user can then uncheck the "OK" box for the Asset and adding comments, the report can be audited later as required by internal procedures. The commenting function should only be used for auditing purposes as adding notes on this report does not affect the system in any way; alarms and notifications will still function in accordance with their usual settings regardless of entries on this report. Previous reports can be view

The report contains the following fields:
1. Asset (customizable asset name)
2. Time (time of the latest reading, based on customizable reporting period)
3. Current (most current reading)
4. Min (customizable minimum threshold)
5. Max (customizable maximum threshold)
6. Diff (difference between threshold and current reading)
7. Type (reading type of input: e.g. Temperature, Humidity, etc)

8. OK (user adjustable setting)
9. Comments (open field for user comments – no character limit)

We need to add information about creating a new Current readings report and then the ability to review and approve the report (Created/Approved reports can be exported as PDF)

Summary Report

The Summary Report shows a daily summary of ~~reading~~ high, low and average readings for the selected period. This report can provide an overview of each Asset for a selected period summarized per day.

Note: Even when shorter time periods are selected, the summary will show as a daily summary, though the data is summarized per the selected period.

The report contains the following fields:
1. Asset Name
2. Tag (asset tag number)
3. Type (reading type, e.g. Temperature, Humidity, Differential Pressure, etc.)
4. Units (measurement units, e.g. C, %RH, in.H2O, etc.)
5. Standard Alarm Limit (customizable limits including the alarm delay per input – see related documents for more info on how to set Standard Alarm Limits)
6. Start Date (first day of the selected period)
7. Date Range (the total time included in the selected period)
8. Average (mean average reading for the selected period)
9. Low (lowest reading in the selected period)
10. High (highest reading in the selected period)
11. MKT (mean kinetic temperature – where applicable)

1.	**Option:** Filter the report by selecting a date range from one of the pre-defined time periods.	6h 12h **1d** 2d 1w 1m
	Results: The adjusted date range and displayed data will refresh and show data based on the time frame selected.	
2.	**Option:** Filter the report by entering a custom date range.	FROM January 1, 2017 1:14 PM TO January 2, 2017 1:14 PM
	Results: The adjusted date range and displayed data will refresh and show data based on the custom date range.	

3.	**Option:** Filter the data to show data from one Asset at a time by selecting a specific Asset from the Asset Name dropdown.	**Asset Name** All Assets ▼ All Assets **AA17882 - Server Rm Water Leak** AA010234 - Blood D5-1 (Ref)

Results: The data will refresh and show data for the selected Asset only.

Summary Report

Create PDF Report   Create Excel Report

Group   **Asset Name**

Client Security ▼   All Assets ▼

| 6h | 12h | 1d | 2d | **1w** | 1m | | **FROM** | March 24, 2017 8:33 AM | **TO** | March 31, 2017 8:33 AM |

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Asset Name   AA04872 - Conf Rm (Ref)
Tag   AA04872
Type   Temperature
Units   C
Standard Alarm Limit   **Low:** -5.00   **High:** 0.00   **Delay(min):** 60

Total Summary

Start Date	Date Range	Average	Low(C)	High(C)	MKT
03/24/2017	7 days, 0h 00m	-2.87	-4.77	0.35	-2.79

Summary by Day

Date	Average	Low(C)	High(C)	MKT
03/24/2017	-3.56	-4.77	-2.15	-3.52
03/25/2017	-3.07	-4.07	-1.93	-3.05
03/26/2017	-3.79	-4.52	-2.87	-3.77
03/27/2017	-3.54	-4.34	-2.73	-3.53
03/28/2017	-2.73	-3.94	-2.03	-2.71
03/29/2017	-1.54	-2.60	0.35	-1.49
03/30/2017	-1.82	-2.91	-0.81	-1.81

Summary Report Example

Audit Log Report

The Audit Log report shows all system events by default or only specific system events based on selected filters. This report can be used to see a current snapshot of all events on a system (e.g. adding a new user, an asset in alarm state, alarm resolution, etc.).

The report includes the following fields:
1. Time (time the event occurred)
2. User (the user that performed the action or "System" if it was a system even like an alarm)
3. Event (the type of event, e.g. Updated, Created, Login, etc.)
4. Type (the system object type affected by the event)
5. Asset Name (Tag) (customizable asset name and unique asset tag)
6. Event Description
7. Comments (field to provide custom comments about the event)

1.	**Option:** Filter the report by selecting an event type from the dropdown.	**Event** All Events All Events Archived **Created** Login Logout Updated
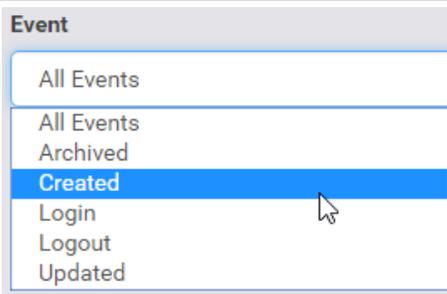
Results: The data will refresh and show system events based on the type selected.

2.	**Option:** Filter the report by selecting a specific user from the dropdown.	**User** All Users All Users system (System) amurphy ( ) zsgroup ( ) rofo ( )
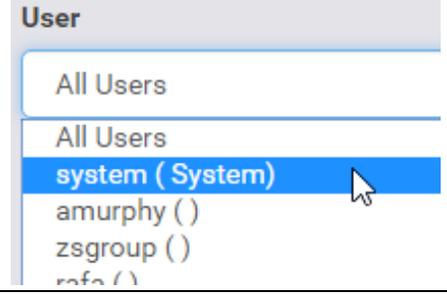
Results: The data will refresh and show system events performed by the selected user.

3.	**Option:** Filter the report by selecting a specific type from the dropdown. This is the type of system object affected by a given user action.	
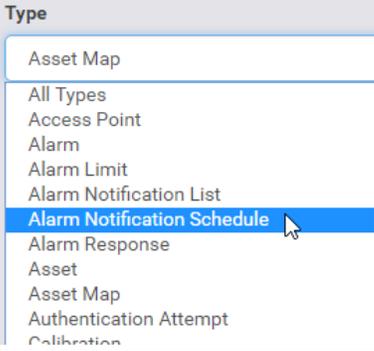
Results: The data will refresh and show only events that affected the selected system object type (e.g. Group, User, Contact, Holiday, etc.).

4.	**Option:** Disable Auto Refresh to select a time range or export the report to a PDF. **Note:** Box is ticked by default and the report will auto refresh once a minute with the most current system data.	
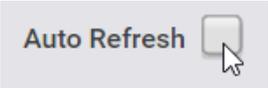
Results: When disabled, you will be able to select a specific time frame (see options below) to filter the report, and export to PDF.

5.	**Option:** Filter the report by selecting a date range from one of the pre-defined time periods.	

Results: The adjusted date range and displayed data will refresh and show data based on the time frame selected.

6.	**Option:** Filter the report by entering a custom date range.	

Results: The adjusted date range and displayed data will refresh and show data based on the custom date range.

7.	**Option:** Click Create PDF Report button to export the report to a PDF.	
Results: The report will be exported to PDF and can be saved per your organizations internal file retention standards.		
8.	**Option:** Click the Add link to add a comment about a system event.	
Results: A popup will appear at the top of the screen with fields to enter comments on the selected event item.		
9.	**Option:** Type a custom comment and enter username and password to sign the entry then click Submit to save.	
Results: The custom comment will be saved to the event record for future reference.		
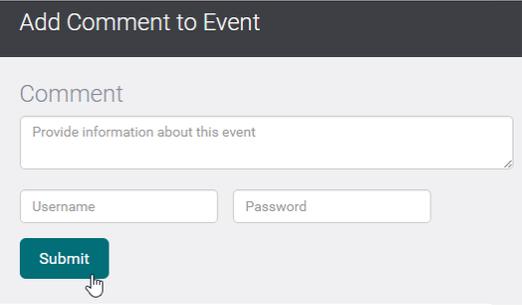
Audit Log Report Example

System Configuration Report

The System Configuration Report shows the configuration of every input on the system grouped by each Asset on the system. The report can be used to check multiple Assets at a time to make sure that they are configured properly. See related documents for how to set up and edit Asset configuration.

The report includes the following fields:
1. Asset Name (Tag) (customizable asset name and unique asset tag)
2. Type (the type of appliance being monitored)
3. Location (Asset location)
4. Groups (list of the groups the Asset is assigned to)
5. Status (Active/Inactive)
6. Alarm Notification Schedule (name of the assigned alarm notification schedule)
7. Holiday Alarm Notification Schedule (name of the assigned holiday alarm notification schedule)
8. Input (information on the specific input including type of readings, input channel, device code, etc.)
9. Alarm Settings (including Min, Max, Alarm Delays and Latching settings for Pre-Alarm, Standard Alarm, and Emergency Alarm thresholds)

System Configuration

			📄 Create PDF Report	📄 Create Excel Report

Assets

Asset Name (Tag)	Type	Location	Groups	Status
AA04872 - Conf Rm (Ref) (AA04872)	Reach-In	Conf Room	global and Client Security	Active
Alarm Notification Schedule: After Hours		Holiday Alarm Notification Schedules: Unassigned		

		Pre-Alarm	Standard	Emergency
Input				
Type: Temperature	Alarm Min (C)	0.0	-5.00	0.0
Serial Number: Channel 1				
Device Code: 3SS	Alarm Max (C)	0.0	0.0	0.0
Input in use? Yes				
Expiration Date: 18-Aug-2017	Alarm Delay (minutes)	0	60.00	0
Calibration Correction: +0.010				
	Latching			
Sensor ID: fa00127e	Alarm Limit In Use		x	
Sensor Type: CheckPoint				

| AA04873 - Lunch Room (Frz) (AA04873) | Reach-In | Lunch Room | global, Client Security, Device, and | Active |

Calibration Report

The Calibration report shows the calibration information for all Assets calibrated within the selected period.

The report includes the following fields:
1. Asset Information (Name, Tag, and Location)
2. Input Information (input number and reading type)
3. Serial Number (probe serial number being calibrated)
4. Device Code
5. Last Cal Date (last date the input was calibrated)
6. Expiry Date (the expiration date of the calibration – usually one year from calibration)
7. As Found (Pass/Fail)
8. As Left (Pass/Fail)
9. Technician (name of the system technician who performed the calibration)
10. Calibration Information (includes the meter info, tolerance, reference value, as found value, etc.)

1.	**Option:** Filter the report by selecting a date range from one of the pre-defined time periods.	6h 12h **1d** 2d 1w 1m

Results: The adjusted date range and displayed data will refresh and show data based on the time frame selected.

| 2. | **Option:** Filter the report by entering a custom date range. | FROM January 1, 2017 1:14 PM   TO January 2, 2017 1:14 PM |

Results: The adjusted date range and displayed data will refresh and show data based on the custom date range.

| 3. | **Option:** Click the All Most Recent button to see the most recently calibration information for every Asset on the system. | All Most Recent |
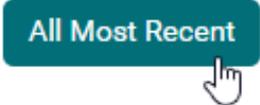
Results: The data will refresh and show the most recent calibration information for every Asset on the system. Assets will be marked as "Not Calibrated" if there is no calibration information for that Asset.

Calibration Report

Create PDF Report

Review calibration information for each input during a given time range.

All Most Recent

- Inputs with calibrations outside this time range will be hidden.
- To see the most recent calibration for each input, select 'All Most Recent' before exporting.

| 1d | 2d | 1w | 1m | 6m | 1y | FROM September 30, 2016 12:26 P   TO March 31, 2017 12:26 PM |

Asset: 900 MHz - AA12908 - E15 Conf A Display Case (RT) (AA12908)

Input 1 - Temperature

Serial Number	Device Code	Last Cal Date	Expiry Date	Cal Type	As Found	As Left	Technician
Channel 1	R3C	22-Dec-2016 9:59 AM -0700	22-Dec-2017	Field Calibration	Pass	Pass	zsgroup

Calibration Pairs (Ref. Meter ID/SN: 1233, Ref. Probe ID/SN: 526623, Tolerance: 0.5)

Reference Value	As Found	As Found Diff	As Found Pass/Fail	As Left	As Left Diff	As Left Pass/Fail
26.23	26.44	0.20	Pass	26.23	0.00	Pass

Asset: 900mhz - Test Dual Probe (1234567)

Calibration Report Example

DV3102	Alarm Types: Pre-Alarm, Standard, Emergency	Define alarm types for an Asset input and demonstrate where to edit alarm types based on desired alarm criteria.
DV3103	Alarm Latching	Outline the difference between latching and non-latching alarms, and show where this setting is located on an existing asset.
DV3105	Alarm Handling: Inhibiting an Alarm	Disabling system notifications for an Asset by temporarily Inhibiting an Alarm for an Asset which is in an Alarm state.
DV3106	Local Audible & Visual Alarm on VPx Sensor	1. Establishing VPx sensor Local Audible & Visual Alarm settings 2. Mute the alarm at the sensor (this does not affect the system alarm handling)
DV3107	Alarm Handling: Closing an Alarm	Resolving an Alarm and Filing a Corrective Action for an Asset which is in an Alarm state.
DV3108	VPx Sensor Min/Max Reset	Reset the Min/Max readings on the VPx sensor.
DV3110	User & Equipment Groups	Setting up new user groups and assigning users and assets to the newly created group.
DV3301	User Roles: User v Group Administrator v. Administrator	
DV3302	User Account Setup	Demonstrate how to set up a new user account.
DV3303	Alarm Notification List Setup	Demonstrate how to set up Alarm Notification Lists
DV3304	Alarm Notification Schedule Setup	Demonstrate how to set up schedules for sending notifications based on day and time.
DV3305	Holiday Schedule Setup	Demonstrate how to set up a Holiday schedule.

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| DV3306 | Set Up - Asset Time Intervals | |