

## Point in Time Reporting

The **Point in Time Reporting** filter allows users to view a report's historical data based on a selected date. This feature makes it possible for users with continuous assessments to view the status of assessments from previous periods (e.g., reviewing a report from a current assessment period, then rewinding the data to view results from the last quarter), or to compare and contrast non-assessment data to review the health or status trend of an organization (e.g., reviewing a report on open incidents by location, then rewinding the data to view the numbers from the previous month).

By default, point in time reporting is disabled for new and existing reports.




The date used to filter the report data is based on the current user's [time zone](#).



A report displaying historical data.

## Important Notes

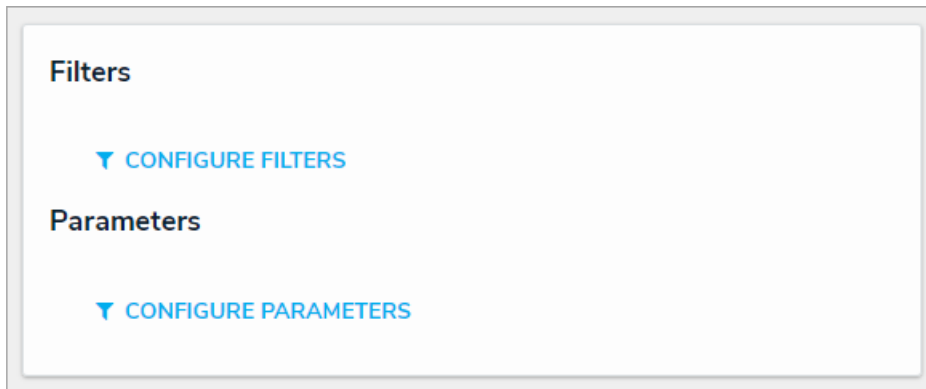
- To use this feature, your organization must have an active [data warehouse](#) that contains data for the desired time period. This means that point in time reporting cannot pull data that predates your data warehouse going live.
- Point in Time reporting data is based on present-day permissions and users can only view historical data for objects they currently have permission to view. For example, if a user previously had access to an object on January 1, but no longer has access today, the report will not include data from that object. Conversely, if a user didn't have access to an object on January 1, but has access today, the report will include data from that object.
- Report data is retrieved from the data warehouse at 23:59:59 on the selected date, based on the current user's time zone. There is currently no option to specify a specific time or alternate time zone.
- To prevent confusion when viewing historical report data, palette access to objects is disabled.
- Point in Time reporting does **not** currently support:
  - Deleted or historical versions of attachments.
  - [Location](#) property data.
  - [Assessment dimension](#) data.
  - Marking the **Report Date** (point in time reporting) filter as required.

- Exporting historical reports to Word documents. Clicking the  icon will export the present-day version of the report.

## Instructions

### To enable point in time reporting:

1. [Create](#) or navigate to an existing report.
2. Click **Configure Filters** to display the **Configure Filters** palette.



*Configure Filters on the Edit Report page.*

3. Click the  icon beside **Enable Filtering by Report Date**.

**CONFIGURE FILTERS**
✕

**SELECT FILTERS**

Select the Fields, Relationships, States, Roles and Formulas that can be applied to this Report

Reviewed On	<span style="background-color: #28a745; color: white; padding: 2px 5px;">CONTROL</span>	<span style="background-color: #6c757d; color: white; padding: 2px 5px;">DATE &amp; TIME</span>
Reviewed On	<span style="background-color: #dc3545; color: white; padding: 2px 5px;">ISSUE</span>	<span style="background-color: #6c757d; color: white; padding: 2px 5px;">DATE &amp; TIME</span>
Reviewed On	<span style="background-color: #6c757d; color: white; padding: 2px 5px;">PROCESS</span>	<span style="background-color: #6c757d; color: white; padding: 2px 5px;">DATE &amp; TIME</span>
Date Identified	<span style="background-color: #dc3545; color: white; padding: 2px 5px;">ISSUE</span>	<span style="background-color: #6c757d; color: white; padding: 2px 5px;">DATE &amp; TIME</span>
Date of Kick Off	<span style="background-color: #6c757d; color: white; padding: 2px 5px;">PROCESS AUDIT</span>	<span style="background-color: #6c757d; color: white; padding: 2px 5px;">DATE &amp; TIME</span>
Expected Completion Date	<span style="background-color: #28a745; color: white; padding: 2px 5px;">CORRECTIVE ACTION</span>	<span style="background-color: #6c757d; color: white; padding: 2px 5px;">DATE &amp; TIME</span>
Date Fieldwork Complete	<span style="background-color: #6c757d; color: white; padding: 2px 5px;">PROCESS AUDIT</span>	<span style="background-color: #6c757d; color: white; padding: 2px 5px;">DATE &amp; TIME</span>
Issue Resolution Date	<span style="background-color: #dc3545; color: white; padding: 2px 5px;">ISSUE</span>	<span style="background-color: #6c757d; color: white; padding: 2px 5px;">DATE &amp; TIME</span>

0 items selected


Enable Filtering by Report Date

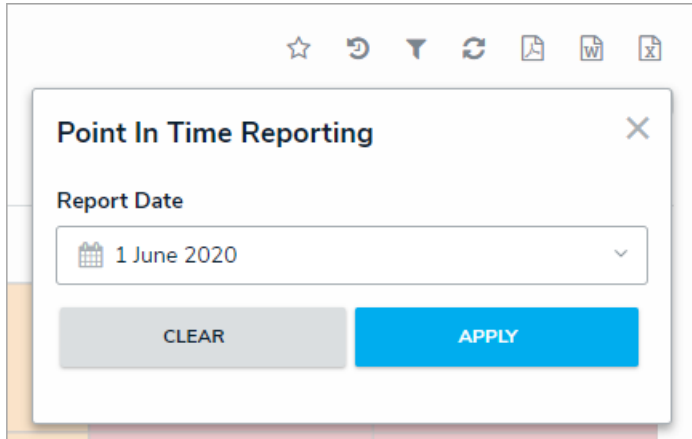
---

Report Date
DATE & TIME


*The Report Date (point in time reporting) filter enabled in the Configure Filters palette.*

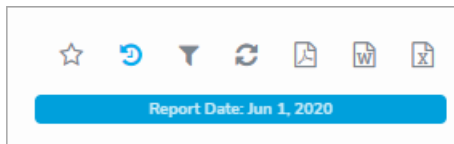
## To view historical report data:

1. Navigate to a report you have permission to view.
2. Click the  icon on the top-right of the report. If Point in Time reporting has not been enabled for this report, this icon will not be visible.
3. Click the **Report Date** field, then select a date from the calendar. The date selected is based on the current user's [time zone](#).
4. Click **Apply** to reload the report with historical data.




*The Point In Time Reporting option.*

5. To view data from a different date, click the  icon, select a date, then click **Apply** to reload the report. When historical data is displayed on a report, this icon is displayed in blue.



*The Point In Time Reporting icon.*

6. To return to present-day data, click the  icon, then click **Clear**.