

Point in Time Reporting

Last Modified on 05/27/2024 2:10 pm EDT

Overview

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.



Note:

The date used to filter the report data is based on the current user's time zone.



A Report Displaying Historical Data

User Account Requirements

To enable **Point in Time Reporting**, the user must have **Administrator** permissions.

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

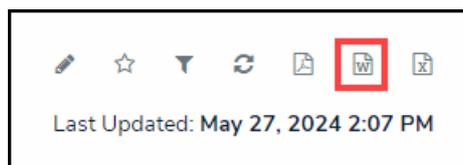
January 1, but has access today, the report will include data from that object.

Related Information/Setup

Please refer to [Create a New Report](#) for more information on creating a new report.

Important Notes

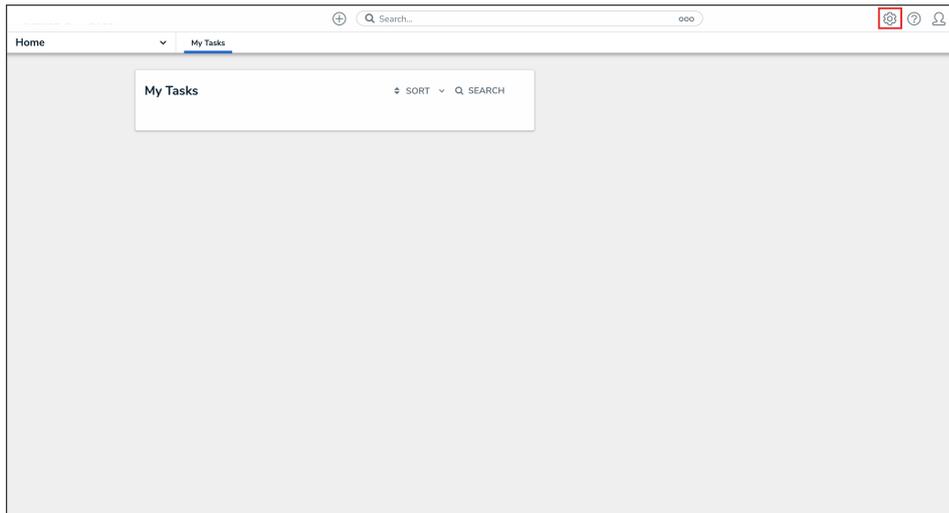
- To use the **Point in Time Reporting** feature, your organization must have an active [data warehouse](#) that contains data for the desired time period. This means that point in time reporting cannot pull data that predates your data warehouse going live.
- Report data is retrieved from the data warehouse 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 **Word** icon will export the present-day version of the report.



Word Icon

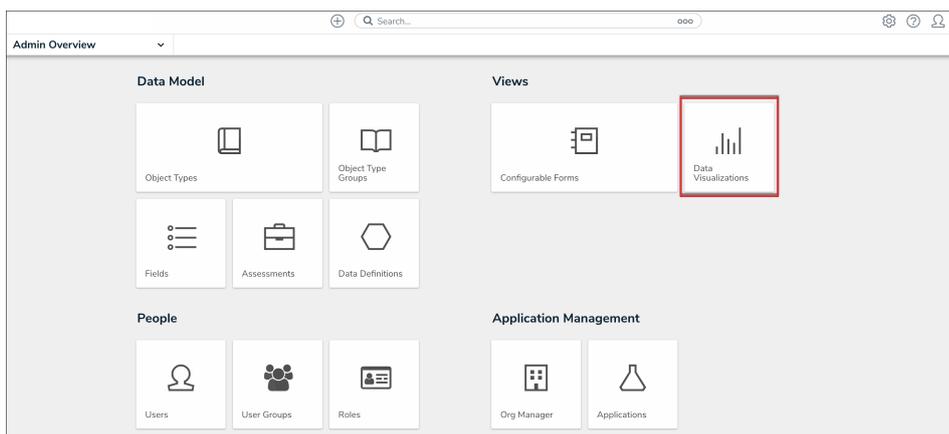
Navigation

1. From the **Home** screen, click the **Administration** icon.



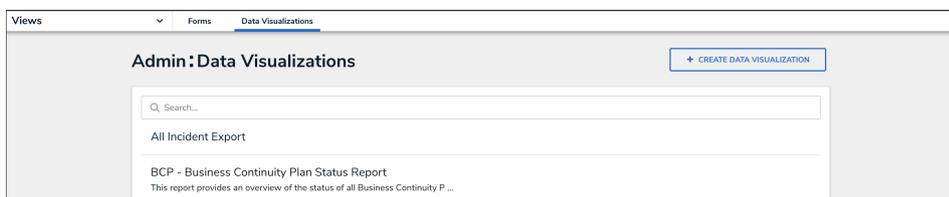
Administration Icon

- From the **Admin Overview** screen, click the **Data Visualizations** tile under the **Views** section.



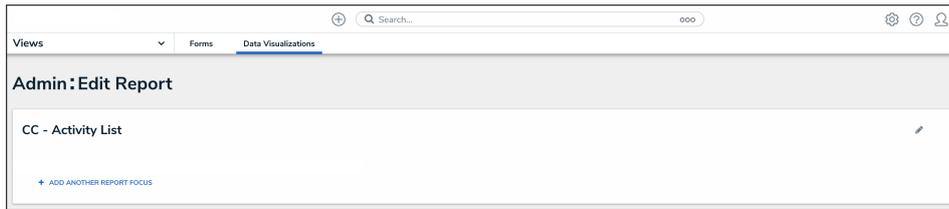
Data Visualizations Tile

- From the **Admin: Data Visualizations** screen, enter a keyword in the Search field to narrow the Data Visualizations list and then click the Data Visualization you wish to enable Point in Time reporting for.



Data Visualization Name

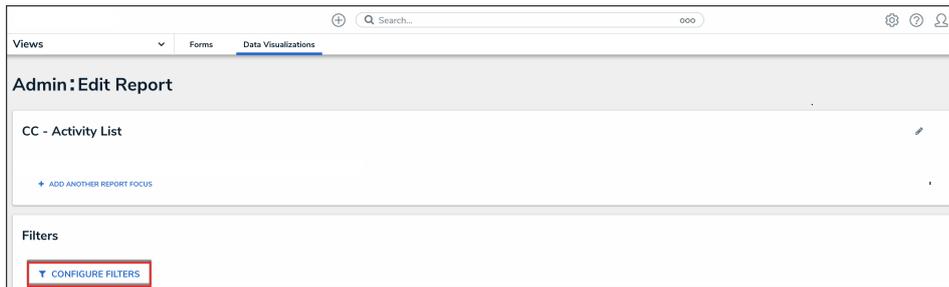
- You can enable **Point in Time Reporting** from the **Admin: Edit Report** screen.



Edit Report Screen

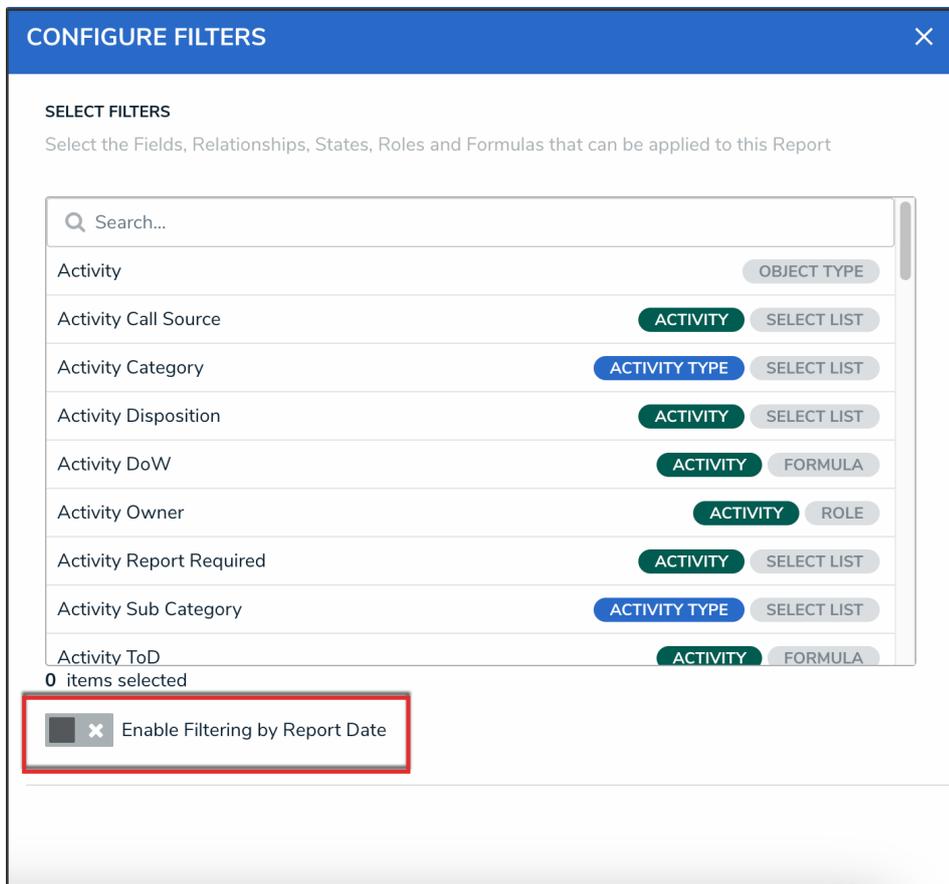
Enabling Point in Time Reporting

1. From the **Admin: Edit Report** screen, click **Configure Filters**.



Configure Filters

2. From the **Configure Filters** pop-up, click the **Enable Filtering by Report Date** toggle switch to turn it on.



Configure Filters Pop-up