

# **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.



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.



		( Q Search	000	\$ \$
Home	✓ My Tasks			
	My Tasks	¢ sort ∨ Q search		

Administration Icon

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

Admin Overview	v		Q Search				000		\$ 0 \$	2
	Data Model				Views			_		
	Object Types		Object Type Groups		Configurable Forms		LIII Data Visualizations			
	e Fields	Assessments	Data Definitions							
	People				Application Ma	nagement				
	Q. Users	User Groups	Roles		Org Manager	Applications				

Data Visualizations Tile

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

Views	Forms Data Visualizations	
	Admin: Data Visualizations	ATE DATA VISUALIZATION
	Q, Search_	
	All Incident Export	
	BCP - Business Continuity Plan Status Report This report provides an overview of the status of all Business Continuity P	

Data Visualization Name

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



			( Q Search	000	2 © \$
Views	✓ Forms	Data Visualizations			
Admin:Edit Repo	ort				
CC - Activity List					1
+ ADD ANOTHER REPORT FOCUS					

Edit Report Screen

## **Enabling Point in Time Reporting**

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

			Q Search	000	\$ @ L
Views ~	Forms	Data Visualizations			
Admin:Edit Report					
CC - Activity List					1
+ ADD ANOTHER REPORT FOCUS					
Filters Y 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	×
<b>SELECT FILTERS</b> Select the Fields, Relationships, States, Roles and Formulas that can be applied to this Report	
Q Search	
Activity OBJECT TYPE	
Activity Call Source ACTIVITY SELECT LIST	
Activity Category ACTIVITY TYPE SELECT LIST	
Activity Disposition ACTIVITY SELECT LIST	
Activity DoW ACTIVITY FORMULA	
Activity Owner ACTIVITY ROLE	
Activity Report Required ACTIVITY SELECT LIST	
Activity Sub Category ACTIVITY TYPE SELECT LIST	
Activity ToD ACTIVITY FORMULA 0 items selected	
Enable Filtering by Report Date	



Configure Filters Pop-up