

Point in Time Reporting

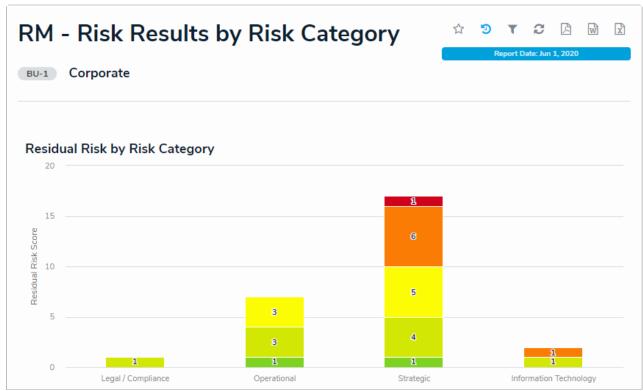
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The **Point in Time Reporting** filter allows users to view a report's historical data based on a selected date. This feature makes it possible for users with continuous assessments to view the status of assessments from previous periods (e.g., reviewing 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:

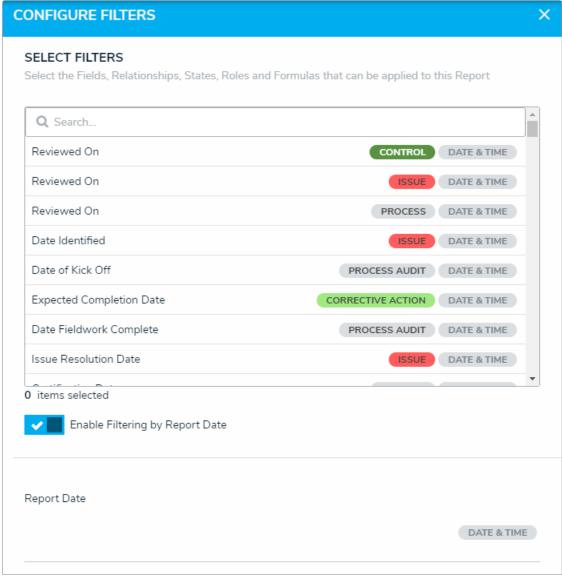
- 1. Create or navigate to an existing report.
- 2. Click Configure Filters to display the Configure Filters palette.



Configure Filters on the Edit Report page.

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



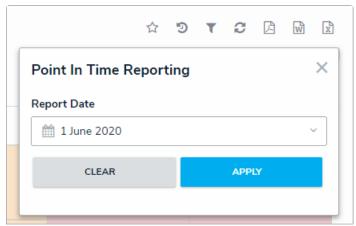


The Report Date (point in time reporting) filter enabled in the Configure Filters palette.

To view historical report data:

- 1. Navigate to a report you have permission to view.
- 2. Click the joicon 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 joicon, 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 $_{\footnotemark{\scriptsize 9}}$ icon, then click $\footnotemark{\textbf{Clear}}.$