

Report Management

Administration Guide

OneVue Sync Bluetooth
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Manage Reports

About managing report profiles

You must be assigned to an Admin role to create and manage report profiles

Report profile settings

From the settings available, you can customize the data included, the report time period, and how often a report is generated.

- What's included in a report is determined by the OneVue solution.
 - **OneVue Sense:** add Monitored Assets.
 - **OneVue Sync with 72MHz devices:** add Transmitters.
 - **OneVue Sync with Bluetooth devices:** add Bridges, Clocks, and Repeaters.
 - **OneVue Sync with PoE devices:** add Clocks.
 - **OneVue Notify with Critical Notifications:** add InfoBoards and Transmitters.
 - **OneVue Notify with Bell Scheduling:** add Bell Controllers and Zones.
- Data fields included and how data is sorted.

By default, each report type has specific fields included. You can optionally remove fields or add available fields.
- Set the time period of data history to include.

Options include reporting on the number of previous days, weeks, months, calendar weeks, calendar months, or a specific date range (manually generated only).
- Set how often a new report is generated by OneVue.

There are four options including manual, daily, weekly, and monthly. The manual frequency can be set to a specific date range for several report types.
- Set who receives report notifications.

When a new report is generated, each user receives an email report notification and the notification is listed on their Dashboard To Do list.

Report types available

Each OneVue solution provides report types that are unique to its use and devices.

The available report types provide device states and event data.

- **Clock Bridge Warning State Report** [12]

The Clock Bridge Warning State Report provides the details of any Sync Bluetooth Bridge in a Warning state. The report also includes each Bluetooth clock and repeater the Bridge received data from over its last connection to the Sync Bluetooth mesh network.

- **Clock-InfoBoard Warning State Report [13]**

The Clock-InfoBoard Warning State report only includes Sync clocks and timers and Notify InfoBoards that are currently in a Warning state. When in a Warning state, a device requires attention to resolve the cause of it entering a Warning state.

- **Digital Event Report (PoE/Ethernet devices only)**

User reports

The user report types provide details of your OneVue users. Only a user assigned to an Admin role has access to these report types.

- **User Report [14]**

The User Report provides details of each user, including their assigned Device Classes, Roles, and Alert Rules, and indicates if a User Profile is inactive.

If a staff member is leaving your organization and you need to reassign their responsibilities, this report provides what's needed to reassign their OneVue responsibilities to another user.

- **User Role Report [17]**

The User Role Report provides details of the Roles and Device Classes assigned to each user.

If you need to understand who has access to account data and features, this report provides what's needed to identify who's assigned to specific Business Units or Locations and their assigned Roles.

Create, view and update report profiles

A Report Profile generates reports. A Report Profile can be configured to meet your reporting requirements. Its settings include the type of report, the clocks included in the report, and how frequently a new report is generated. A Report Profile can also be configured to generate an email notification to specific users when a new report is generated.



NOTE

To view a report, your User Profile is required to be assigned to the Business Unit or Location of the devices that are included in the report. Commonly you are only assigned to what you are responsible for.

To create or update a Report Profile, your User Profile is required to be assigned to an Admin role.

Create a new report profile

1. Go to **Reports > Active**.
2. From the bottom section select **+ New**. A new Report Profile is displayed.

- Enter the **Report Name** and select the **Report Type**.
The settings available may vary by the selected Report Type.

Setting	Definition
Report Name	Name of the report; should uniquely identify the report in a short description. Allows up a maximum of 50 characters.

Setting	Definition
Report Type	<p>The available report types provide device states and event data.</p> <ul style="list-style-type: none"> • Clock Bridge Warning State Report [12] The Clock Bridge Warning State Report provides the details of any Sync Bluetooth Bridge in a Warning state. The report also includes each Bluetooth clock and repeater the Bridge received data from over its last connection to the Sync Bluetooth mesh network. • Clock-InfoBoard Warning State Report [13] The Clock-InfoBoard Warning State report only includes Sync clocks and timers and Notify InfoBoards that are currently in a Warning state. When in a Warning state, a device requires attention to resolve the cause of it entering a Warning state. • Digital Event Report (PoE/Ethernet devices only)
Notes	For information purposes and commonly provides additional details needed to be shared with system users.

4. Enter the **Interval settings** .

Setting	Definition
Generation Frequency	<p>Set how often a new report is generated. There are four options, including manual, daily, weekly and monthly. The manual frequency can be set to a specific date range for several report types.</p> <ul style="list-style-type: none"> • Manual: Report is not system generated. To generate the report, the Run Now function is required to be performed by a user. Several report types also allow manual reports to be configured for a specific date range, including data for the current day. To configure a report for a date range, from the Report on Previous setting, select the option Specific Dates. • Daily: Report is generated each day at the specified time of the day. • Weekly: Report is generated once per week on the specified day of the week and time of the day. • Monthly: Report is generated monthly on the specified day of the month and time of day.

Setting	Definition
Report on the previous (selection) of History	<p>The number of days, weeks, months, or specific date range of history included in the report.</p> <ul style="list-style-type: none"> • Days: Includes data from the number of days selected, excluding the day the reported is generated on. • Weeks: Includes data for the number of weeks (7 days in each week) selected, excluding the day the reported is generated on. For example if a report is set to include 2 weeks and is generated on a Monday, the report will include the last 14 days of data ending on Sunday. • Months: Includes data for the number of months selected based on the day the report is set to be generated on. For example, if set to include 1 month and generated on the tenth day of the month at 8:00 am, the report data starts on the tenth day of the previous month and ends on the tenth day of the current month at 8:00 am. • Calendar Weeks: Includes data from Sunday to Saturday (inclusively) for the number of weeks selected. For example if set to include 2 calendar weeks and generated on a Monday, the report includes data from Sunday to Saturday for the previous 2 weeks. • Calendar Months: Includes data from the start of the month to the end of the month (inclusively) for the number of months selected. For example if a report is set to include 2 calendar months and generated Monthly, the report will include data for the two prior months. • Specific Dates (only available for Manual generation frequency): Includes the data for the date range set in the From and To settings.

5. Add **users** that are to receive an email notification when a new report is generated. To add a user, from the Add Users drop-down list select a user and select Add. All users added are displayed.

Setting	Definition
Send To	When a new report is generated, each user added receives a report notification email and the report is listed on their Dashboard To Do list.

6. Add the **data** that is to be included in the report.

Setting	Definition
What (varies by solution & report type)	<p>This selection identifies what the report will include. What's displayed will vary based on the report type selected. The report type selected is based the OneVue solution deployed at your facility.</p> <p>To add items to the report, select the options available from the drop-down list and repeat as required. The table will list what's included in the report.</p> <ul style="list-style-type: none"> • OneVue Sense: add Monitored Assets. • OneVue Sync with 72MHz devices: add Transmitters. • OneVue Sync with Bluetooth devices: add Bridges, Clocks, and Repeaters. • OneVue Sync with PoE devices: add Clocks. • OneVue Notify with Critical Notifications: add InfoBoards and Transmitters. • OneVue Notify with Bell Scheduling: add Bell Controllers and Zones. <p>If a Business Unit or Location is added, all items assigned to the Business Unit or Location are included. If a Business Unit or Location is a parent to other Business Units, all of its child Business Units or Location assigned items are included. Adding a Business Unit(s) can simplify managing what's included, eliminating the need to add single items individually.</p>
Fields to Include	The fields to be included in the report and the fields available vary by the selected report type.
Sort By	The single field report data is sorted by
Not available for all Report Types	
Group By	The single field report data is grouped by. The report is grouped in sections by the field selected and the sections are sorted alphabetically in ascending order.
Not available for all Report Types	

7. When done, select **Save**.

[View or update a report profile](#)

1. Go to **Reports > Active**.
2. From the list select the **Name** link of the Report Profile. Its profile is displayed.
3. From its profile, you can update the following settings. Settings may vary by the Report Type.

Setting	Definition
Report Name	Name of the report; should uniquely identify the report in a short description. Allows up a maximum of 50 characters.

Setting	Definition
Report Type	<p>The available report types provide device states and event data.</p> <ul style="list-style-type: none"> • Clock Bridge Warning State Report [12] The Clock Bridge Warning State Report provides the details of any Sync Bluetooth Bridge in a Warning state. The report also includes each Bluetooth clock and repeater the Bridge received data from over its last connection to the Sync Bluetooth mesh network. • Clock-InfoBoard Warning State Report [13] The Clock-InfoBoard Warning State report only includes Sync clocks and timers and Notify InfoBoards that are currently in a Warning state. When in a Warning state, a device requires attention to resolve the cause of it entering a Warning state. • Digital Event Report (PoE/Ethernet devices only)
Notes	For information purposes and commonly provides additional details needed to be shared with system users.

Setting	Definition
Generation Frequency	<p>Set how often a new report is generated. There are four options, including manual, daily, weekly and monthly. The manual frequency can be set to a specific date range for several report types.</p> <ul style="list-style-type: none"> • Manual: Report is not system generated. To generate the report, the Run Now function is required to be performed by a user. Several report types also allow manual reports to be configured for a specific date range, including data for the current day. To configure a report for a date range, from the Report on Previous setting, select the option Specific Dates. • Daily: Report is generated each day at the specified time of the day. • Weekly: Report is generated once per week on the specified day of the week and time of the day. • Monthly: Report is generated monthly on the specified day of the month and time of day.

Setting	Definition
Report on the previous (selection) of History	<p>The number of days, weeks, months, or specific date range of history included in the report.</p> <ul style="list-style-type: none"> • Days: Includes data from the number of days selected, excluding the day the reported is generated on. • Weeks: Includes data for the number of weeks (7 days in each week) selected, excluding the day the reported is generated on. For example if a report is set to include 2 weeks and is generated on a Monday, the report will include the last 14 days of data ending on Sunday. • Months: Includes data for the number of months selected based on the day the report is set to be generated on. For example, if set to include 1 month and generated on the tenth day of the month at 8:00 am, the report data starts on the tenth day of the previous month and ends on the tenth day of the current month at 8:00 am. • Calendar Weeks: Includes data from Sunday to Saturday (inclusively) for the number of weeks selected. For example if set to include 2 calendar weeks and generated on a Monday, the report includes data from Sunday to Saturday for the previous 2 weeks. • Calendar Months: Includes data from the start of the month to the end of the month (inclusively) for the number of months selected. For example if a report is set to include 2 calendar months and generated Monthly, the report will include data for the two prior months. • Specific Dates (only available for Manual generation frequency): Includes the data for the date range set in the From and To settings.

Setting	Definition
Send To	When a new report is generated, each user added receives a report notification email and the report is listed on their Dashboard To Do list.

Setting	Definition
What (varies by solution & report type)	<p>This selection identifies what the report will include. What's displayed will vary based on the report type selected. The report type selected is based the OneVue solution deployed at your facility.</p> <p>To add items to the report, select the options available from the drop-down list and repeat as required. The table will list what's included in the report.</p> <ul style="list-style-type: none"> • OneVue Sense: add Monitored Assets. • OneVue Sync with 72MHz devices: add Transmitters. • OneVue Sync with Bluetooth devices: add Bridges, Clocks, and Repeaters. • OneVue Sync with PoE devices: add Clocks. • OneVue Notify with Critical Notifications: add InfoBoards and Transmitters. • OneVue Notify with Bell Scheduling: add Bell Controllers and Zones. <p>If a Business Unit or Location is added, all items assigned to the Business Unit or Location are included. If a Business Unit or Location is a parent to other Business Units, all of its child Business Units or Location assigned items are included. Adding a Business Unit(s) can simplify managing what's included, eliminating the need to add single items individually.</p>
Fields to Include	The fields to be included in the report and the fields available vary by the selected report type.
Sort By	The single field report data is sorted by
Not available for all Report Types	
Group By	The single field report data is grouped by. The report is grouped in sections by the field selected and the sections are sorted alphabetically in ascending order.
Not available for all Report Types	

4. To apply setting updates, select **Save**.

Archive a report profile

When you no longer want a report to be generated, the Report Profile must be set to archived. When set to archived, OneVue does not generate reports for the Report Profile and all of its historical reports are located in the archived reports view.



NOTE

You must be assigned to an Admin role to create and manage report profiles

1. Go to **Reports > Active**.
2. From the list select the **Name** link of the Report Profile. Its profile is displayed.
3. From the bottom menu, select **Archive Report Profile & Report History**.

The report profile and its report history are archived. To view or download archived reports, go to **Reports > Archived** > from the list, select the **Name** of the archived Report Profile.

Clock Bridge Warning State Report

The Clock Bridge Warning State Report provides the details of any Sync Bluetooth Bridge in a Warning state. The report also includes each Bluetooth clock and repeater the Bridge received data from over its last connection to the Sync Bluetooth mesh network.

- When the cause of the Warning state is resolved and the Bridge returns to a Normal state, the other clocks and repeaters should also return to a Normal state.
- If the Bridge is in a Warning state and did not receive data during its last connection to the Sync Bluetooth mesh network, the report displays "There are no clocks currently for this Bridge".

The following provides details of what's included in the report and an example of the report.

Report heading detail

- **Heading:** displays the name of the Report Profile and the report date range.
- **Signature:** when the report is manually generated (run now) by a user, the name of the user is displayed. If the report was automatically generated by the schedule set in the Report Profile, no information is displayed and the signature line can be used for written signature purposes.
- **Run date:** date and time the report was created.
- **Account:** OneVue account name.

Bridge details

Report is sectioned by each Bridge and details each Bluetooth clock and repeater the Bridge received data from over its last connection to the Sync Bluetooth mesh network.

- **Business Unit:** Business Unit assigned to the Bridge.
- **Location:** Location assigned to the Bridge.
- **Gateway ID:** Unique 12-character ID (MAC address) of the Bridge.
- **Status:** The status of the Bridge at the time the report was generated. Identifies the condition that resulted in the Bridge entering a Warning state.
- **Days in Warning:** Number of days the Bridge has been in a Warning state.

Bluetooth Clock or Repeater details

- **Clock Name:** Name of the clock or repeater. By default, set to its 12-character Device ID (BTID).
- **Business Unit:** Business Unit assigned to the clock or repeater. By default, set to the account Business Unit.
- **Location:** Location assigned to the clock or repeater. By default, a location is not assigned to a device.

- **BTID:** Each device is identified by a unique Device ID, allowing it to receive its unique settings managed in OneVue, and authenticate and connect to the mesh network.
- **State:** The state of the device at the time the reported was generated.
- **Status:** The status of the device at the time the report was generated. The status indicates the cause of the device entering a Warning state.
- **Days in Warning:** Number of days the device has been in a Warning state.

Report example

Signature: _____
 Run Date: 2019-08-12 07:04:25 AM
 Account: **AAron Memorial Hospital-DEMO**

Bridge Warning State Report

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Business unit: AAron Memorial Hospital-DEMO
Bridge Name: Bridge
Location:

Gateway ID: 00:1E:B3:8F:C3:E0
Status: Unresponsive
Days in Warning: 23

Clock Name	Business Unit	Location	BTID	State	Status	Days in Warning
CC:44:4E:14:7C:CF	AAron Memorial Hospital-DEMO		CC:44:4E:14:7C:CF	Warning	Unresponsive	20
F4:42:0A:26:48:F5	AAron Memorial Hospital-DEMO		F4:42:0A:26:48:F5	Warning	Unresponsive	20

Clock-InfoBoard Warning State report

The Clock-InfoBoard Warning State report only includes Sync clocks and timers and Notify InfoBoards that are currently in a Warning state. When in a Warning state, a device requires attention to resolve the cause of it entering a Warning state.

The following provides details of what's included in the report and an example of the report.

Report heading detail

- **Heading:** displays the name of the Report Profile and the report date range.
- **Signature:** when the report is manually generated (run now) by a user, the name of the user is displayed. If the report was automatically generated by the schedule set in the Report Profile, no information is displayed and the signature line can be used for written signature purposes.
- **Run date:** date and time the report was created.
- **Account:** OneVue account name.

Report details

Below are all fields that can be included in the report.

- **Clock/InfoBoard Name:** Name of the device. By default, set to its 12-character Device ID/MAC address.
- **Type:** Identifies the device model.
- **Business Unit:** Business Unit assigned to the device.
- **Location:** Location assigned to the device.
- **Gateway ID:** Unique 12-character ID (MAC address) of the Bridge that last reported the device's status.



- **BTID:** Sync clock with Bluetooth wireless technology has a unique Bluetooth ID, allowing it to receive its unique settings managed in OneVue, and authenticate and connect to the mesh network.
- **State:** State of the device at the time the reported was generated.
- **Status:** Status of the device at the time the report was generated. The status identifies the condition that resulted in the device entering a Warning state.
- **Days in Warning:** Number of days the device has been in a Warning state.

Report example

Signature: _____
 Run Date: 2019-10-01 09:42:45 AM
 Account: **Primex Demo**

Clock-InfoBoard Warning State Report

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Clock-Info Board Name	Type	Business Unit	Gateway ID	BTID	Location	State	Status	Days In Warning
Analog Bluetooth Rm Z2	Clock	Primex Demo	00:1E:B3:8F:98:4F	CC:EF:4C:49:FA:22		Warning	Low Battery	69
InfoBoard Rm B2	Info Board	Primex Demo	00:1E:B3:04:16:02			Warning	Unresponsive	4

User report

The User Report provides details of each user, including their assigned Device Classes, Roles, and Alert Rules, and indicates if a User Profile is inactive.

If a staff member is leaving your organization and you need to reassign their responsibilities, this report provides what's needed to reassign their OneVue responsibilities to another user.

The following provides details of what's included in the report and an example of the report.

Report details

Report heading detail

- **Heading:** displays the name of the Report Profile and the report date range.
- **Signature:** when the report is manually generated (run now) by a user, the name of the user is displayed. If the report was automatically generated by the schedule set in the Report Profile, no information is displayed and the signature line can be used for written signature purposes.
- **Run date:** date and time the report was created.
- **Account:** OneVue account name.

User profile detail

The report is sectioned by each user added to the report, displaying their user name and email. Inactive is displayed when a User Profile is deactivated, which the user cannot log in to OneVue and does not receive alert or system notifications.

Within each user section, the following details are provided. If a user is assigned to multiple devices classes, Business Units, Locations, and Alert Rules the report includes this level of detail.



- **Device Classes:** identifies the user's assigned Device Classes. It's recommended that a user is assigned to the Device Classes for the OneVue solution deployed at your organization.
- **Business Unit Roles:** lists a user's assigned Business Unit and Role. A user may be assigned to more than one Business Unit.
- **Location Roles:** lists a user's assigned Location and Role. A user may be assigned to more than one Location.
- **User Alert Rules:** lists the Alert Rules that generate alert notifications to the user during an alarm condition.
 - **Alert Name:** name of the Alert Rule.
 - **Team:** if the Alert Rule uses Team scheduling, identifies the name of the Team.
 - **Shift:** if the Alert Rule uses Team scheduling, identifies the shift the user is added to.
 - **Escalation:** identifies if the user receives alert and/or escalation notifications. Alerts Go To indicates the user receives alert notifications and Escalate To indicates the user receives one-time escalation notifications.

Signature: John Smith
Run Date: 2019-09-25 07:21:30
AM Account: **Primex Example**

User Report

John Smith <johnsmith@example.com>

Device Classes: Clocks/Bridges, Sensors, Bell Controllers/Message Boards, Transmitters, Info Boards

Business Unit Roles

Primex Example: Account administrator

Location Roles

No roles assigned

User Alert Rules

Alert Rule Name	Team	Shift	Escalation
B Pharmacy	-	-	Alerts Go To
C Clinic	-	-	Alerts Go To
	Clinic Team	Shift 2	Alerts Go To
A Food Services	-	-	Escalate To

User Role report

The User Role Report provides details of the Roles and Device Classes assigned to each user.

If you need to understand who has access to account data and features, this report provides what's needed to identify who's assigned to specific Business Units or Locations and their assigned Roles.

The following provides details of what's included in the report and an example of the report.

Report details

Report heading detail

- **Heading:** displays the name of the Report Profile and the report date range.
- **Signature:** when the report is manually generated (run now) by a user, the name of the user is displayed. If the report was automatically generated by the schedule set in the Report Profile, no information is displayed and the signature line can be used for written signature purposes.
- **Run date:** date and time the report was created.
- **Account:** OneVue account name.

User detail

If a user is assigned to more than one Business Unit or Location, multiple rows are displayed for each of the user's assigned Business Unit or Location.

- **User:** first and last name and email address of the user.
- **Active:** indicates if the user is active (Yes) or deactivated (No).
- **Role:** the role assigned to the user by Business Unit or Location.
- **Role Type:** identifies if the role assigned is a BU (Business Unit) or Location.
- **Entity (Location/BU):** name of the Location or Business Unit the user's role is assigned to.
- **Device Classes:** identifies the user's assigned Device Classes. It's recommended that a user is assigned to the Device Classes for the OneVue solution deployed at your organization.

User Role Report

User	Active	Role	Role Type	Entity (Location/BU)	Device Classes
John Smith <johnsmith@example.com>	Yes	BU User	BU	Primex Example	Clock, Sensor, Transmitter, Info Board
Bob Jones <bobjones@example.com>	Yes	Account Admin	BU	Primex Example	Clock, Sensor, Transmitter, Info Board
Sue Smith <suesmith@example.com>	Yes	BU Admin	BU	Clinic	Clock, Sensor
Jan Reynolds <janreynolds@example.com>	Yes	Account Admin	BU	Primex Example	Clock, Sensor, Transmitter, Info Board
Larry Geneva <larrygeneva@example.com>	Yes	Network Admin	BU	Primex Example	Clock, Sensor, Transmitter, Info Board
Sam Donahue <samdonahue@example.com>	Yes	BU User	BU	Clinic	Clock, Sensor

Technical Support

You may require Technical Support when you have questions about product features, system configuration, or troubleshooting. Support services are delivered in accordance with your organization's support agreement, end-user license agreements, and warranties, either with a Primex Certified Sales and Service Partner or directly with Primex.

Support through Primex Certified Sales and Service Partners

Ensuring our customers experience excellent service is of utmost importance to Primex. Our network of Certified Sales and Service Partners offers technical support services for Primex products.

If you have purchased Primex products or have a service agreement with a Primex Partner, they are your primary contact for all Technical Support inquiries.

Primex Technical Support

Make sure you have satisfied the system requirements that are listed in your product documentation. Also, you should be at the computer or device on which the problem occurred, in case it's necessary to replicate the problem.

When you contact Primex Technical Support, please have the following information available:

- Customer ID/Account Name
- Problem description/error messages
- Device hardware information
- Troubleshooting performed before contacting Primex
- Recent network changes

PRIMEX TECHNICAL SUPPORT

Monday through Friday from 8:00 AM to 5:00 PM CT

Phone: 1-262-729-4860

Email: service@primexinc.com