

Report Management Guide

OneVue Sync PoE

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About managing report profiles

Reports are generated by Report Profiles. A Report Profile is configured with custom settings and a report type. 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 is included in the report, which is determined by the OneVue solution.
 - **OneVue Sense:** add Monitored Assets.
 - **OneVue 72MHz Sync:** add Transmitters.
 - **OneVue Bluetooth Sync:** add Bridges, Clocks, and Repeaters.
 - **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-InfoBoard Warning State Report [5]**

Includes Notify InfoBoards and Sync Bluetooth Clocks and Repeaters currently in a Warning state.

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 [6] (PoE/Ethernet devices only)**

Includes digital events logged by PoE Code Blue and Elapsed Timers. Data includes the time of each event, the event type, event action, timer value, and user entered comments. A timer transmits its digital events to OneVue during each check-in.

User reports

User report types provide details of your OneVue users, from their assigned roles, device classes, and alert rules. These reports can only be accessed by a user assigned to an Admin role.

- **User Report [6]**

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 [10]**

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.

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 sections provide an overview of the report and an example.

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 device.
- **BTID:** Only applies to the devices that part of the OneVue Sync solution with Bluetooth wireless technology.
- **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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2019-08-06 - 2019-09-30

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:4 C:49:FA: 22		Warning	Low Battery	69
InfoBoard Rm B2	Info Board	Primex Demo	00:1E:B3:04:16:02			Warning	Unresponsive	4

Digital Event Report

The Digital Event report includes the digital events reported by PoE Code Blue and Elapsed Timers. A timer transmits its digital events to your OneVue account during each check-in.

The report details include:

- **Clock Name:** name of the device. Commonly identifies its install location.
- **Business Unit:** the Business Unit assigned to the device.
- **Location:** the location assigned to the device (optional setting).
- **Event Type:** type of event that took place. Events include Count Up, Count Down, Code Blue.
- **Event Action:** the action that took place, which is invoked by the timer control switch. Actions included Display, Start, Stop, and Reset.
- **Comments:** comment added by a user.
- **Time of Event:** when the event took place.
- **Timer Value:** value of the timer at the time of the event.

Report example

A Digital Event report

Clock Name	Business Unit	Location	Event Type	Event Action	Comments	Time of Event	Timer Value
Code Blue clock	Clock BU	My cube	CODE BLUE	START		2018-08-27 13:59:09 -0500	00:00:00
Code Blue clock	Clock BU	My cube	CODE BLUE	START		2018-08-27 14:00:02 -0500	00:00:00
Code Blue clock	Clock BU	My cube	CODE BLUE	STOP		2018-08-27 14:00:09 -0500	00:00:06
Code Blue clock	Clock BU	My cube	COUNT UP	START		2018-08-27 14:20:50 -0500	00:00:00
Code Blue clock	Clock BU	My cube	COUNT UP	STOP		2018-08-27 14:20:52 -0500	00:00:02
Code Blue clock	Clock BU	My cube	CODE BLUE	START		2018-08-27 14:21:05 -0500	00:00:00
Code Blue clock	Clock BU	My cube	CODE BLUE	STOP		2018-08-27 14:21:12 -0500	00:00:06
Code Blue clock	Clock BU	My cube	CODE BLUE	START		2018-08-27 14:21:30 -0500	00:00:00
Code Blue clock	Clock BU	My cube	CODE BLUE	STOP		2018-08-27 14:26:42 -0500	00:05:11

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 sections provide an overview of the report and an example.

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 details

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:** Alert Rule the user is added to.
 - **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.

Report example

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.

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

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.

Report example

Signature: John Smith
Run Date: 2019-09-24 08:16:41 AM
Account: **Primex Example**

User Role Report

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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

Create, view and update report profiles

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.

1. Go to **Reports > Active**.
2. To **view or update** a report profile, select the **Name** link of the Report Profile.

- To create a new report profile, from the bottom section select **+ New**. A new Report Profile is displayed.

OneVue AARon Memorial Hospital-DEMO (95393) Bob Smith

Dashboard Monitoring Scheduling Devices Reports Admin Help

Reports → Report Profile

Report Profile

Report Name *

Report Type * Alert Evaluation Report ▼

Notes

Interval

Generation Frequency ▼

Report on the previous * ▼ of history

Custom day boundary

Send To

Add Users ▼

Name

Data

What Assets * ▼

Name	Category	Status

Fields to Include

- Current Min-Max
- Mean Temp
- Currently in Alarm
- Most Recent Alarm Duration
- Current Alarm Type
- Average Duration of Alarm
- Percentage of Period in Alarm
- Average Per day Above
- Average Per day Below
- Average Check-Ins Per Day

Sort By ▼

Group By ▼

4. Select the **Report Type**, which identifies the unique report. Settings may vary by 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.
Report Type	<p>The available report types provide device states and event data.</p> <ul style="list-style-type: none"> • Clock-InfoBoard Warning State Report [5] Includes Notify InfoBoards and Sync Bluetooth Clocks and Repeaters currently in a Warning state. 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 [6] (PoE/Ethernet devices only) Includes digital events logged by PoE Code Blue and Elapsed Timers. Data includes the time of each event, the event type, event action, timer value, and user entered comments. A timer transmits its digital events to OneVue during each check-in.
Notes	For information purposes and commonly provides additional details needed to be shared with system users.

5. 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.
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.

6. 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.

7. 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 72MHz Sync: add Transmitters. • OneVue Bluetooth Sync: add Bridges, Clocks, and Repeaters. • 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	

8. When done, 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, the Report Profile does not generate reports and all of its historical reports are located in the archived reports view.

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

The report profile is archived and its history reports are available in the archived reports view. To view archived reports, go to **Reports > Archived**.

View and download archived reports

Archived Reports are reports generated by a Report Profile that has been archived. When archived, OneVue retains and stores all reports generated by the Report Profile for seven (7) years. OneVue does not allow reports to be deleted.



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.

1. Go to **Reports > Archived**. The Report Profiles that have been archived are listed.
2. To view the reports, from the **archived column** select the profile **View Reports** link. The list of archived reports is displayed.

Report Profile Name	Report Type	Archived
*** BWB Asset Summary	Asset Summary	View Reports
***Mike asset summery	Asset Summary	View Reports
***TS Asset Summary	Asset Summary	View Reports

Date Generated	Download PDF	Download CSV	Status	Reviewed By	Date Reviewed	Comments
2019-06-26 8:20 AM	Download PDF	Download CSV	Not Reviewed			

3. To view reports within a specific date range, enter a **start date** and **end date** to filter the reports displayed.
4. To view the report, select either the **PDF or CSV** link. The type of file available is dependent on the report type - not all report types are available in a CSV file type.
 - **PDF file:** opens in a new web browser tab. You can then download the PDF file.
 - **CSV files:** automatically downloaded and saved to your computer's Downloads location.

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

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