



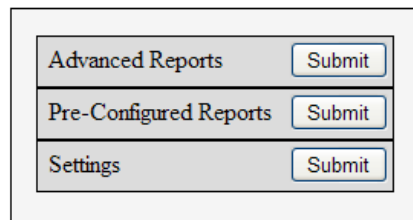
How to Add and Edit Groups

Doc. HT110

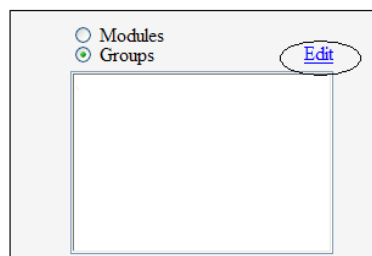
Setting up groups allows you to run reports on selected alarms, information fields or processes. For example, each of your modules may have one or two alarms that signify downtime. You can create a group called downtime which would allow you to group all downtime alarms from each module into a single report. To create a group, login to the system and take the following steps from the main menu:

Navigate to the Edit Groups Menu

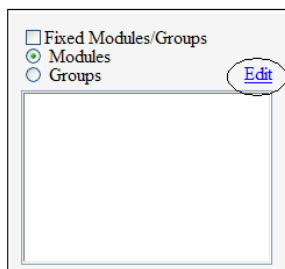
1. Click **Report Packages** from the menu to the left side of the screen.
2. From the **Report Packages** page, select **Shift Reporting** and click **Submit**.
3. From the **Shift Reporting Package** page, there are three ways to arrive at the **Edit Groups** page. Take one of the following steps:



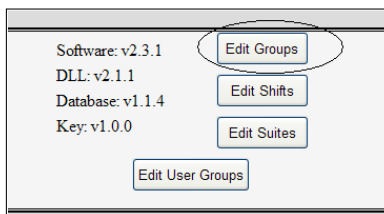
- a. Locate **Advanced Reports** and click **Submit** → From the **Advanced Reports** page, locate **Groups** and click **Edit**.



- b. Locate **Pre-Configured Reports** and click **Submit** → Click **Edit Pre-Configured Reports** → From the **Pre-configured Reports** page, locate **Groups** and click **Edit**.

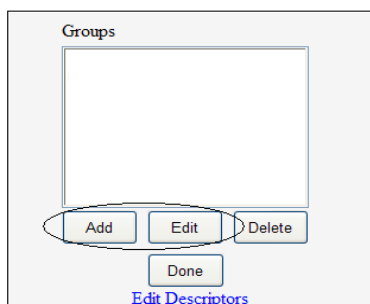


c. Locate **Settings** and click **Submit** → From the **Administration** page, click **Edit Groups**.

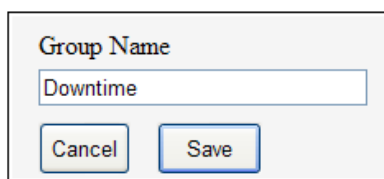


Add/Edit Groups

4. From the **Edit Groups** menu, click **Add** to add a new group. To modify an existing group, highlight it and click **Edit**.



5. From the **Edit Group** page, enter a **Group Name**.



6. Depending on the type of group you want to create, select from the following options. You may select more than one option.

Option	Applies To	Function
Alarms	All Modules	You want to create a group of alarms.
Information Fields	DI Modules	You want to create a group of information fields.
Processes	DI Module Only	You want to create a group of processes.

<input checked="" type="checkbox"/> Alarms
<input type="checkbox"/> Information Fields
<input type="checkbox"/> Processes

Additional input is required based on your selection. Whether you choose Alarms, Information Field or Processes, the following steps are the same.

- From the drop down list on the right side of the screen, select the module from which you would like to pull alarms/information fields/processes.

The screenshot shows a configuration window with the following elements:

- Group Name:** Downtime
- Group Number:** -1
- Options:** Alarms, Information Fields, Processes
- Buttons:** Cancel, Save, Edit Descriptors
- Left List Box:** All
- Alarms Section:** <-- Add, Remove -->
- Right List Box:** myCallStation, DI Misc, DI4, myCallStation, myCallStation2 (highlighted), RCM5, RCMModule
- Footer:** Base Menu, Log Out

- From the drop down list on the left side of the screen, select a descriptor for your group. If your report does not require descriptors, select **None**. Descriptors are typically used to describe the function of your alarm(s), information field(s), or process(es).

Note: If you do not see a descriptor that suits your needs, you can add and edit custom descriptors. See **HT111 - How to Add and Edit Descriptors** for more information.

The screenshot shows the same configuration window as above, but with the following changes:

- Left List Box:** All, All, None, Scheduled Downtime, Unscheduled Downtime, Downtime (highlighted), Total Count, Bad Count, Good Count
- Right List Box:** myCallStation2, Button 1, Button 2, Button 3, Button 4
- Footer:** Base Menu, Log Out

- In the list box on the right side of the screen, select the alarm(s)/information field /process(es) you would like to add to the group.

10. Click **Add**.

Group Name: Downtime
Group Number: -1
 Alarms
 Information Fields
 Processes
Cancel Save [Edit Descriptors](#)

Downtime

Alarms

<- Add

Remove ->

myCallStation2

Button 1
Button 2
Button 3
Button 4

[Base Menu](#) [Log Out](#)

11. Your selections appear in the list box on the left side of the screen. To add additional alarms/information fields/processes to the group, return to step 7 and repeat.

12. Click **Save**.

13. From the **Edit Groups** menu, click **Done** to return to the **Shifting Report Package** menu.