VersaCall Reporting Software (VRS)

Administrator Manual

Updated for VRS Builds 1.0.6 & 1.0.7

Revised 7/21/2009

About VRS

The VersaCall Reporting Software (VRS) package is an add-on to the VT2000 System that allows for the display and interpretation of captured data. For general reporting requirements, VRS users can purchase standard reporting suites and configure the reports to suit their needs. For more specific requirements, VRS users can purchase custom reports that are tailored to their needs. With tools such as Scheduled (Automatic) Reports and Pre-Configured Reports, VRS provides management with a fast and easy way to see productivity on the floor.

About VRS Reporting Suites

VRS Standard Suites are a collection of reports that typically include one report for each of the following:

- By Month
- By Week
- By Day
- By Detail (alarm)
- By Module
- Tabular Listing

Each VT2000 System purchase comes with a complimentary reporting suite titled Incident Quantity. Additional packages are purchased either individually or bundled. Custom reports are considered when the need arises for reports outside the scope of the standard reporting suites. Custom reports are quoted based on complexity. Generally speaking, if the information is captured, it can be displayed in a report.

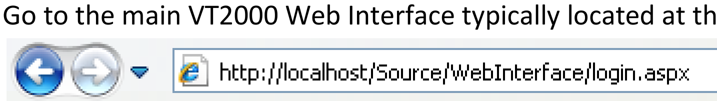
Getting Started in VRS

Logging In

There are a couple options for logging in to the VRS package.
One option is to login to the main VT2000 Web Interface and follow the path to VRS.

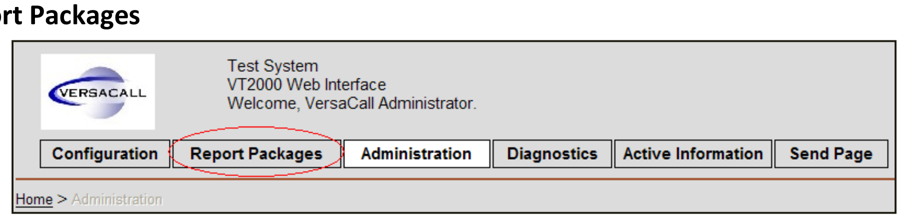
To login this way:

1. Go to the main VT2000 Web Interface typically located at the following URL *

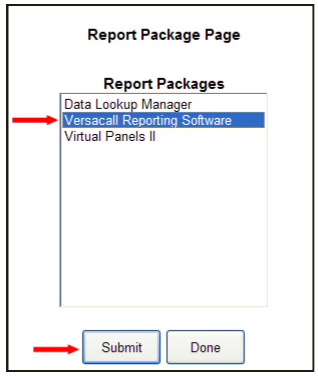


*Replace *localhost* with your company's designated IP Address

2. Click **Report Packages**



3. Select *VersaCall Reporting Package* from the list of packages and click **Submit**.



4. Either a new window or tab opens (depending on your browser settings) with the VRS Main page.

The other option is to have a URL that takes you directly to the VRS Main page.

1. Go to the VRS Main page typically located at the following URL*:

*Replace *localhost* with your company's designated IP Address

2. Login with the same credentials used for the main VT2000 Web Interface.

NOTE: This is a good option for Administrators to give Reports Only users who do not need access to the rest of the VT2000 System. Reports Only users could use this URL as a shortcut to go directly to the VRS Main page and bypass the main VT2000 Web Interface.

User Groups

VRS User Groups allows an administrator to designate rights and privileges within VRS to existing user groups.

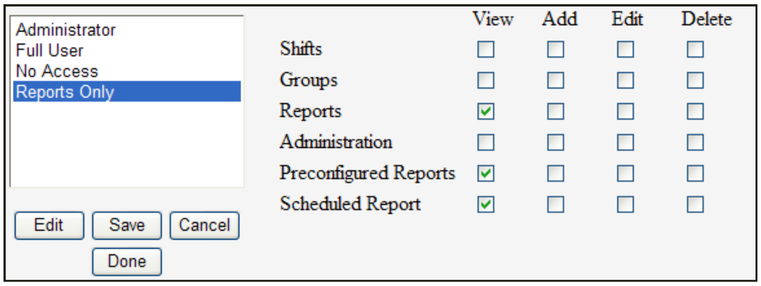
To add or edit user group privileges:

1. Go to the VRS Main page
2. Click **Administration**
3. Click **Edit User Groups**

The user groups available for editing are those that have already been defined in the main VT2000 Web Interface. (See the VT2000 Administrator Manual for more information.)

4. Select the user group you wish to edit from the list.
5. Click **Edit**. This enables the check boxes to the right.

6. Check the corresponding boxes to set the desired privileges.



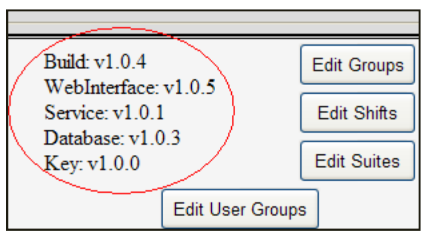
7. Click **Save** to apply settings.

Version Information

Version information becomes important when a VersaCall representative helps you troubleshoot any issue you may experience with VRS.

To view version information :

1. Go to the VRS Main page
2. Click **Administration**
3. Version information appears near the top of the page



Miscellaneous Settings (Product Key, Debug Mode, Database, VRS Service Status)

Other administration settings appear on the Administration Page.

To get to the Administration page:

1. Go to VRS Main page
2. Click **Administration**

From this page you can set the following:

System Name	Any name for the customer's system (typically customer's name)
Product Key	Supplied by VersaCall to register the reporting package
Debug Mode	VRS generates detailed log files when in Debug Mode. This should be

	unchecked unless there is a problem you and/or a VersaCall Representative are trying to resolve. Leaving VRS in Debug Mode for an extended period of time could potentially slow down your system's performance.
Database	Default database type is Microsoft Access. This database stores all report information. VersaCall Reporting Software also supports Microsoft SQL Server
Name	Name of the VRS Database (SQL Server only)
Path	Path to the location of the reporting package database (ACCESS only)
Server	Name of the SQL Server on which the database is located (SQL Server only)
User	User name for SQL Server access (SQL Server only)
Password	Password associated with the above user name (SQL Server only)
Service Status	Shows the status of the VRS service running in the background
Start	Starts the VRS service
Stop	Stops the VRS service
Refresh	Refreshes the VRS service status

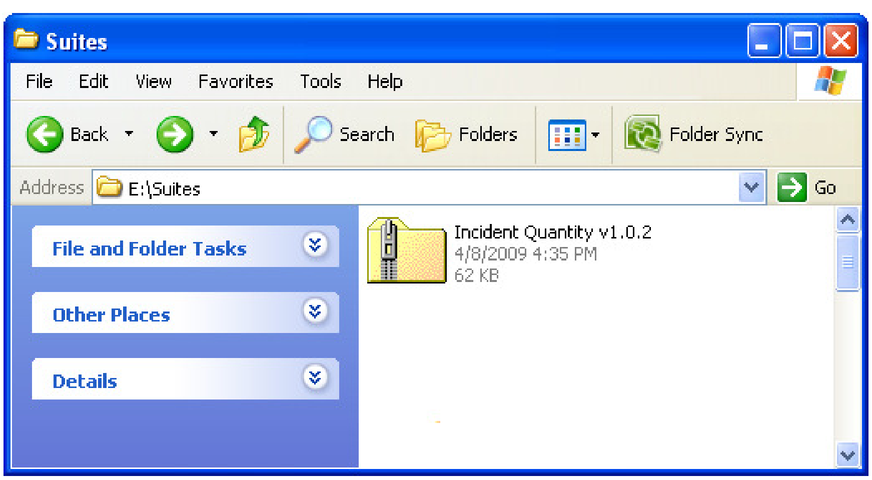
Reporting Suites

New suites and suite updates require you to upload the suite to the system. When you order a new suite or an update to a suite becomes available, a VersaCall representative provides you with download information. The report suite comes in the form of a .ZIP file.

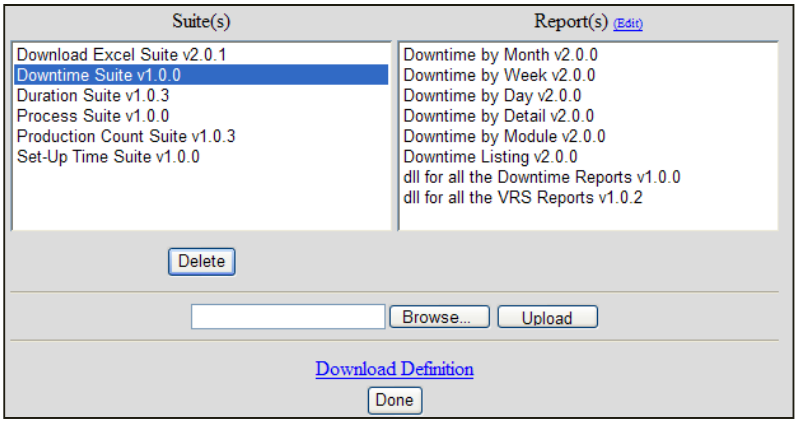
Uploading a Reporting Suite

To upload a reporting suite, follow these steps:

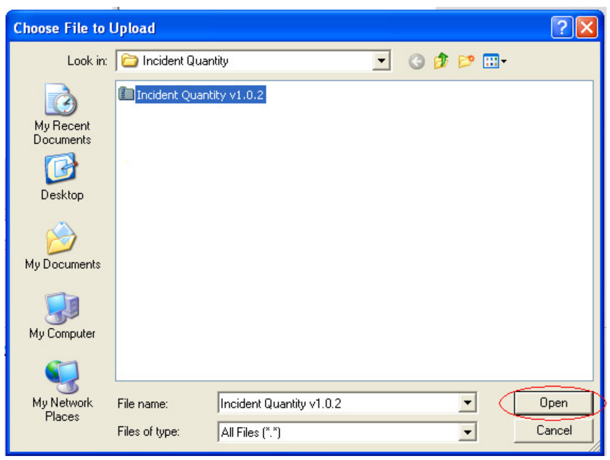
1. Download the reporting suite and take note of its location. DO NOT extract this file. For example, you may wish to install Incident Quantity v1.0.2.zip.



2. Go to the VRS Main page,
3. Click **Administration**
4. Click **Edit Suites**



5. Click **Browse**
6. Locate your .ZIP file, select and click **Open**



7. Click **Upload**.
8. Your newly uploaded suite shows up in the Suite(s) list and is ready for use. See below for more information on running a report.

NOTE: Your suite will not install successfully if the suite you are trying to install is older than a previously installed version. If your intention is to install a suite that is older than the installed suite, you must first remove the installed suite. New suite versions automatically override older suite versions.

Troubleshooting Reporting Suite Errors

In certain cases, a VersaCall Representative may need to know the definition information for all the suites uploaded to your VRS Software package. In such a case, the representative will ask you to download the definition.

To download suite definitions:

1. Go to the VRS Main page,
2. Click **Administration**
3. Click **Edit Suites**
4. Click **Download Definition**
5. When prompted, save the definition file to a location on your computer.
6. Email the file to the VersaCall representative who is helping you.

Before Running a Report

In order to customize the VRS reporting tool to meet your needs, you may first want to check that shifts and groups are configured to your liking. When running a report, you can use these shifts and groups to filter information.

Editing Shifts

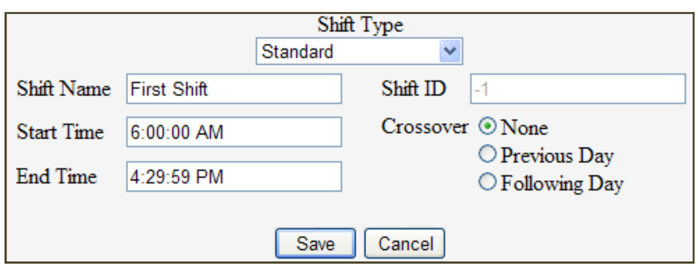
In order to filter reports by shifts, you first need to define your work shifts appropriately.

NOTE: Shifts configured in the VRS package are independent of shifts configured in the main VT2000 Web Interface or in other VT2000 add-on packages.

Work Shifts

To configure a work shift:

1. Go to the VRS Main page
2. Click **Edit Shifts**
3. Click **Add**



4. Fill in the Shift properties:

Shift Type	The type of shift you want to create
Standard Shift	Use a Standard Shift if shift start and end times are the same every day of the week.
Varying Shift	Use a Varying Shift if shift times and days worked vary from day to day and week to week.
Shift Name	A reference name given to the shift
Shift ID	An auto-generated number used internally by the system to manage shifts (Non-editable)

For a **Standard Shift**, fill in the remaining properties as follows:

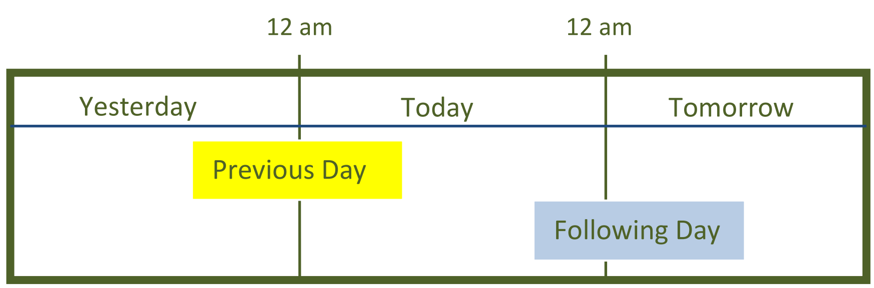
Start Time	The shift start time
End Time	The shift end time (Typically one second less than the actual end time to avoid overlap with adjacent shifts)
Crossover	Crossover refers to shifts that cross midnight into another day. The following options help deal with such shifts:
None	Select when the shift does not cross midnight
Previous Day	This shift starts yesterday and runs in to today. Events are attributed to today for reporting purposes. Previous Day applies only to shifts that cross midnight. *See Figure Below*
Following Day	This shift starts today and runs into tomorrow. The events are attributed to today for reporting purposes. Following Day applies only to shifts that cross midnight. *See Figure Below*

For a **Varying Shift**, fill in the remaining properties as follows:

Included Days	If a box in this column is checked, the corresponding day will be included in your shift. All corresponding properties must be filled if a day is included in your shift.
Start Time	The shift start time for the corresponding day. The time must be in the following format HH:MM:SS AM or HH:MM:SS PM *Example: 09:00:00 AM*
End Time	The shift end time for the corresponding day. The time must be in the following format HH:MM:SS AM or HH:MM:SS PM *Example: 04:59:59 PM*
Crossover	Crossover refers to shifts that cross midnight into another day. The following options help deal with such shifts:
None	Select when the shift does not cross midnight
Previous Day	This shift starts yesterday and runs in to today. Events are attributed to today for reporting purposes. Previous Day applies only to shifts that cross midnight. *See Figure Below*
Following Day	This shift starts today and runs into tomorrow. The events are attributed to today for reporting purposes. Following Day applies only to shifts that cross midnight. *See Figure Below*

NOTE: Crossover settings are limited by the options you have selected for the day prior to or after the day you are currently configuring. For example, if your Monday shift starts at 5 PM and ends at 1 AM and you have selected Following Day as your crossover, then you cannot have a Tuesday shift that starts at 5 PM and ends at 1 AM with a Previous Day crossover because this would create a conflict.

Dealing with Crossover



5. Click **Save**

Full Day Definitions

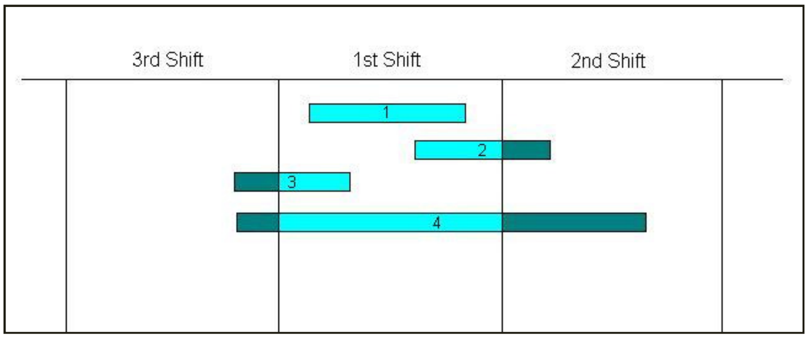
A Full Day definition allows you to define a 24 hour period. By default a Full Day is defined as beginning at 12:00:00 am (midnight) and ending just before midnight the next day at 11:59:59 pm. However, certain scenarios may require that your Full Day definition differs from a standard day. In such a case, you may modify your Full Day definition.

To modify the Full Day definition for reporting purposes:

1. Go to the VRS Main page
2. Click **Edit Shifts**
3. Click **Edit Full Day Definition**
4. Fill in the properties as you would for a work shift (see above), <u>but with the following exceptions:</u>
    - Leave the **Shift Name** as *Full Day*
    - Make sure the shift covers a 24 hour period
5. Click **Save**

What Happens If an Alarm or Process (Event) Crosses a Shift?

It may occur that an event begins in one shift and runs into another shift. What happens in such case? Below are some points for understanding how report data is filtered based on a shift.



- If an event is contained completely within a shift, then the entire event will be contributed to that shift.
- If no portion of the event occurred within a shift, the event is disregarded completely.
- If a portion of the event crosses into other shifts, then the event is "sliced" meaning the portion of the event that occurred within the shift is attributed to that shift. In the case of an Incident Quantity report, this would result in multiple instances of the event appearing as if there are multiple events. In the case of a Duration report, the times would be split according to how much of the event occurred within each shift.

Editing Groups

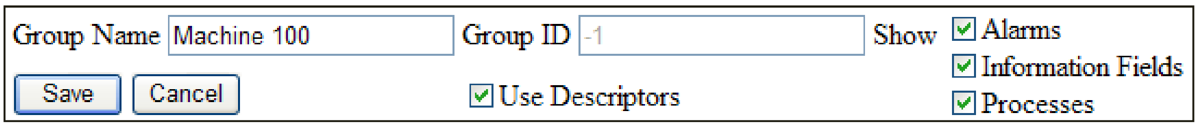
Groups are probably VRS's most powerful tool for creating meaningful reports of any kind. They allow you to group captured data into a way that becomes meaningful in your reports. Groups allow you to tag alarms, processes and information fields with descriptions (known as *descriptors* within VRS) such as downtime, set-up time, scrap, employee number, part number, job number, etc. After you have created one or more groups, you can filter your report data by these groups.

NOTE: Groups configured in the VRS package are independent of groups configured in the main VT2000 Web Interface or in other VT2000 add-on packages.

Creating Groups

To create a group:

1. Go to the VRS Main page
2. Click **Edit Groups**
3. Click **Add**
4. Start by filling in the properties at the top of the page:



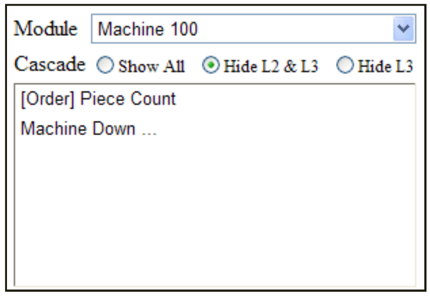
Group Name	The reference name given to the group
Group ID	An auto-incremented number used internally by the system to manage groups (non-editable)
Show	When a box is checked, the menu for the corresponding information type expands (shows) below.
Alarms	Shows the Alarms menu.
Information Fields **(DI Modules Only)**	Shows the Information Fields menu. Information Field refers to any data input field (i.e., a field that requires operator input).
Processes **(DI Modules Only)**	Shows the Processes menu
Use Descriptors	Enables the descriptor option. Certain reports require descriptors. If in doubt, check the box.

NOTE: DI Modules – If your group includes any alarm that is active during a process, you must also include the appropriate process and its parent process in the group. Otherwise, any events that occurred for those alarms will not show up in a report.

Next, you can select pieces of information to add to the group from each of the Information Type menus (i.e., Alarms, Information Fields, and Processes).

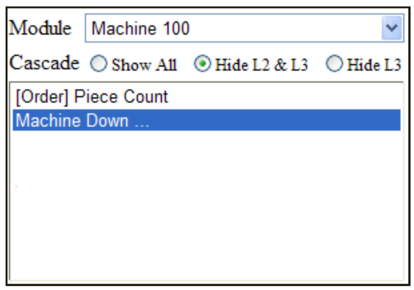
To add to the group:

5. Select the appropriate module from the drop down list on the right side of the screen.

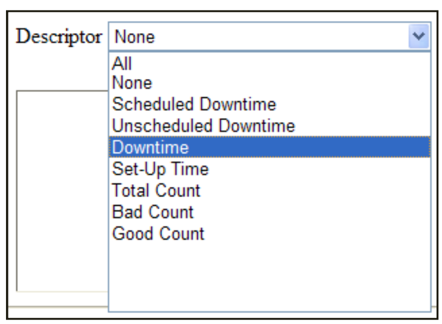


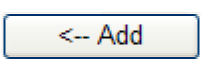
NOTE: The right side of the screen holds *available alarms*. Once they are added to the group, they are no longer available unless removed from the group.

6. Choose a cascade option. *See About Cascading below for more information.*
7. Select the information pieces to add to the group. You may select more than one information piece at a time. If using descriptors, select information pieces with the same descriptor.



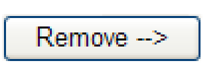
8. If using descriptors, select a descriptor to give to the selected alarms from the drop down list on the left side of the screen.



9. Click 

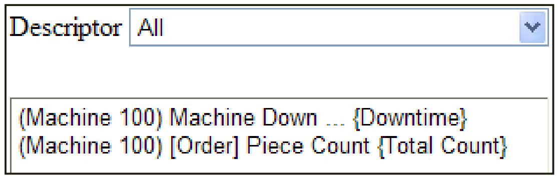
to add information pieces to the group. The selected information pieces then appear on the left side of the screen meaning they have been added to the group.

   Additional functions:

   - Click 

to remove information pieces from the group. The selected information pieces then appear on the right side of the screen meaning they have been removed from the group and back in the pool of available alarms, information fields or processes.

- Select **All** from the descriptor drop down list to see all information pieces included in your group for that information type. The descriptor appears in braces next to the information piece.



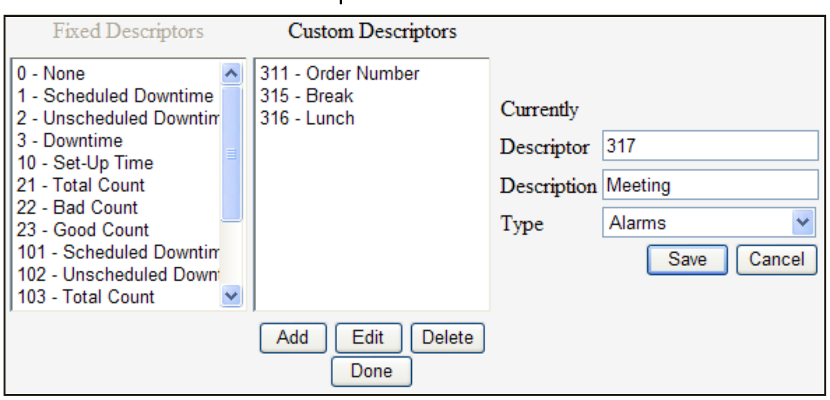
10. When complete with adding desired information pieces for each information type, click **Save** located at the top of the page.

Editing Descriptors

The VRS package comes with fixed descriptors that cannot be modified. You can create custom descriptors if the fixed descriptors do not suit your needs. For the most part, you will not need to modify descriptors at all. Generally, custom descriptors are only added if you order a custom report that requires a descriptor not included in our fixed descriptor list.

To add a custom descriptor:

1. Go to the VRS Main page
2. Click **Edit Groups**
3. Click **Edit Descriptors**
4. Click **Add** located. This enables the properties to the right.
5. Fill in the properties for the custom descriptor:



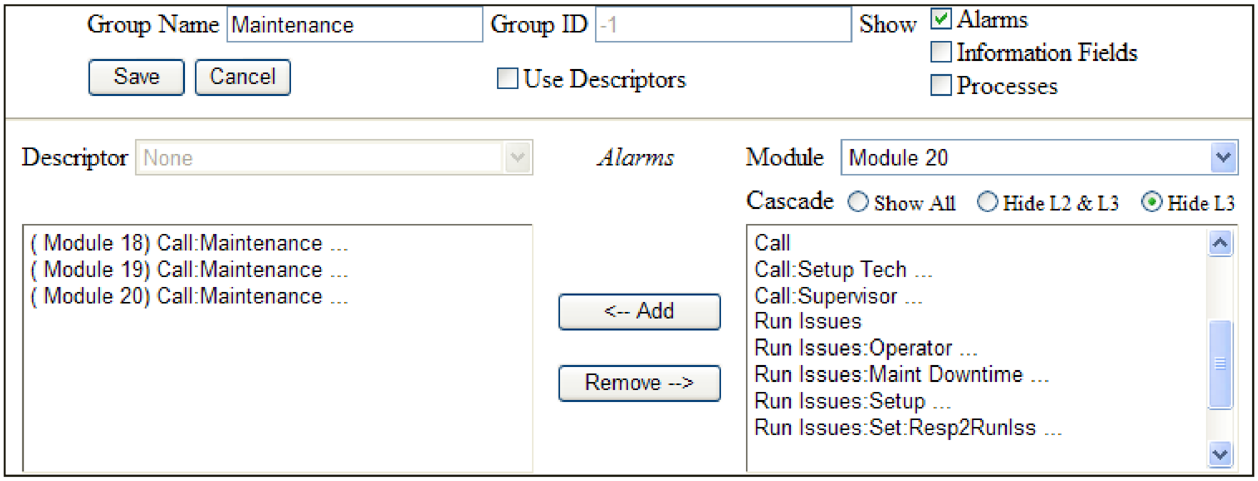
Descriptor	A number for the custom descriptor. Custom descriptors should be given a number of 300 and up. In most cases, the VersaCall representative writing your custom report will advise you on which number(s) to use.
Description	The name for the custom descriptor
Type	The information type this descriptor can be applied to.

6. Click **Save**

Group Examples

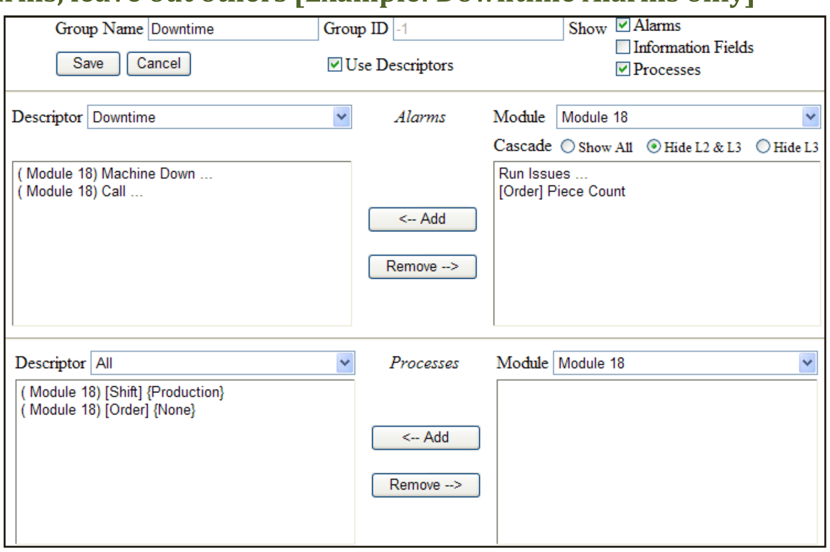
Group usage in reports varies per customer need, but here are some examples of common group usage:

One alarm from multiple modules



You may have multiple modules that are all configured similarly. In such a case, you may want to create a group for each alarm in order to run a report for that alarm. For example, you may have multiple modules across the production floor that all have a Maintenance alarm. You could create a group called Maintenance and include all the Maintenance alarms from each module. When you run a report for this group, you would see maintenance duration times for all the maintenance alarms across the production floor.

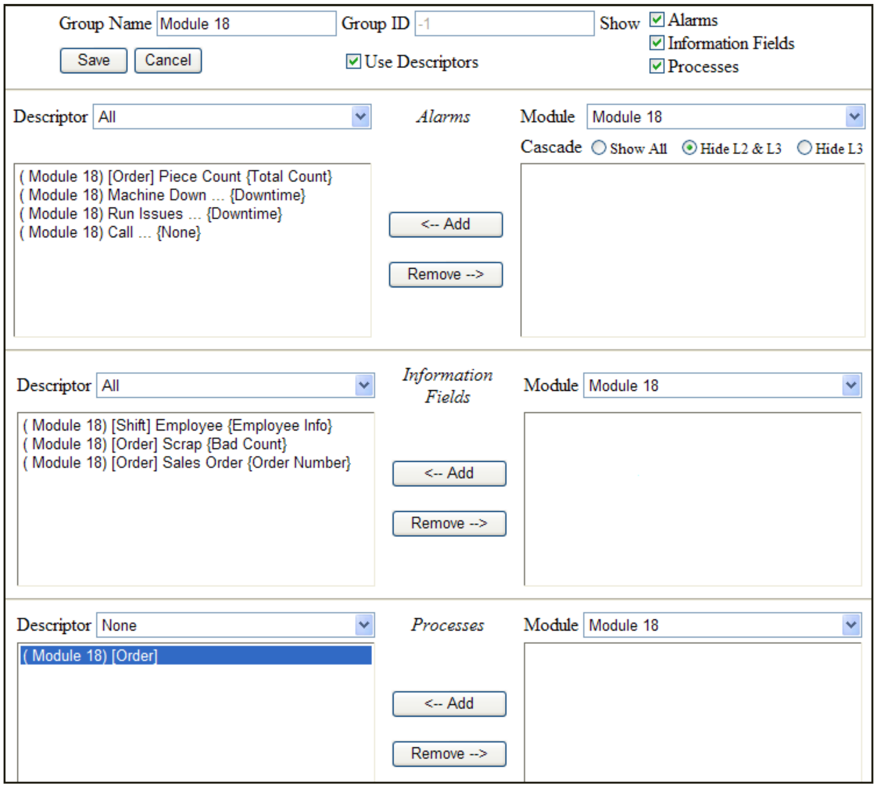
Only certain alarms, leave out others [Example: Downtime Alarms only]



NOTE: This group example includes the Shift and Order process because the Machine Down alarm is active during those processes.

There are certain cases where you may want to include some alarms, but not others as part of a group. For example, you may want to create a Downtime group in which you only include alarms you consider downtime. When you run a report such as a Downtime or Duration report, it would include the duration times for all the alarms included in this group.

One group for each module - Includes all alarms with descriptors for each



In some cases, it makes more sense to create a group for each module. This would allow you to run different reports that require descriptors with just one group (per module). In such a case, you would create a group and give it the name of the module. In this group, you would include all alarms, information fields and processes belonging to that module. Each alarm would be given a descriptor.

Editing Lookup Filters

Lookup Filters apply to reports run by data input fields. For example, you may wish to run a report by part number, employee id or sales order number.

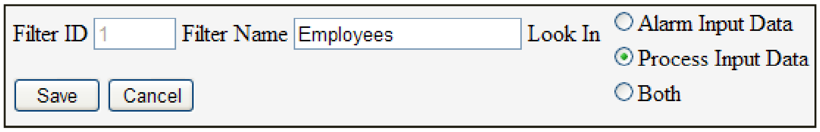
Without lookup filters, the results are not distinguished between different types of data. For example, your results would include part numbers, employee ids and sales order numbers.

To limit results to only one type of data, use lookup filters. For example, if you only want to include employee ids from module 1, module 2 and module 3 in your search, then you would include those fields from each module in your lookup filter. You would then select this filter when running your report.

Creating a Lookup Filter

To create a Lookup Filter:

1. Go to the VRS Main Page
2. Click **Lookup Filters**
3. Click **Add**
4. Start by Filling in the properties at the top of the page

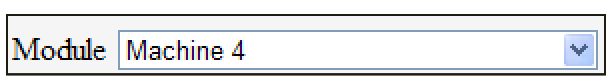


Filter ID	An auto-incremented number used internally by the system to manage groups (non-editable)
Filter Name	Any meaningful name given to the group
Look In	Indicate where to look for the input data. Checking a box expands the associated menu.
Alarm Input Data	Check this if you only want to look for input data related to alarms, process triggers or process alarms. *Example: A supervisor ID scanned in when responding to a call is considered Alarm Input Data*
Process Input Data (DI Modules Only)	Check this if you only want to look for input data related to a process. Process Input Data is all input data entered into a DI Module during a process. *Example: A work order number scanned in by an operator when starting a job is considered Process Input Data*
Both	Check this if you want to look for input data associated with both alarms and processes

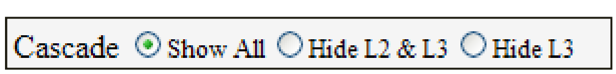
Next, select data pieces to add to the group. Do this for alarm input data and/or process input data depending on the options you selected above.

To add data pieces to the Lookup Filter:

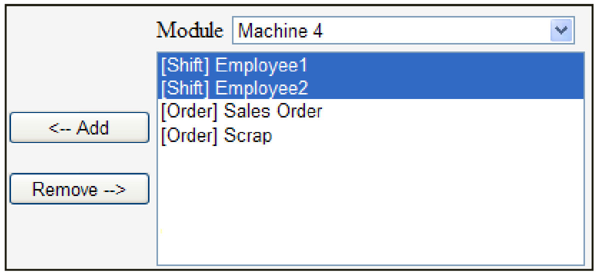
1. Select a module from the drop down list to the right.



2. For Alarm Input Data, select a cascade method or leave as Show All.
   See below for more information on Cascading.

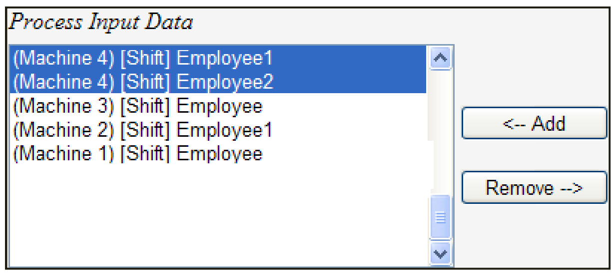


3. Select a data piece from the list to the right and click **Add**. The data piece moves from right to left.



To remove data pieces from the Lookup Filter:

1. Select the data piece from list to the left and click **Remove**. The data piece moves from left to right. The selected data pieces appear on the right side of the screen meaning they have been removed from the group and back in the pool of available data pieces.

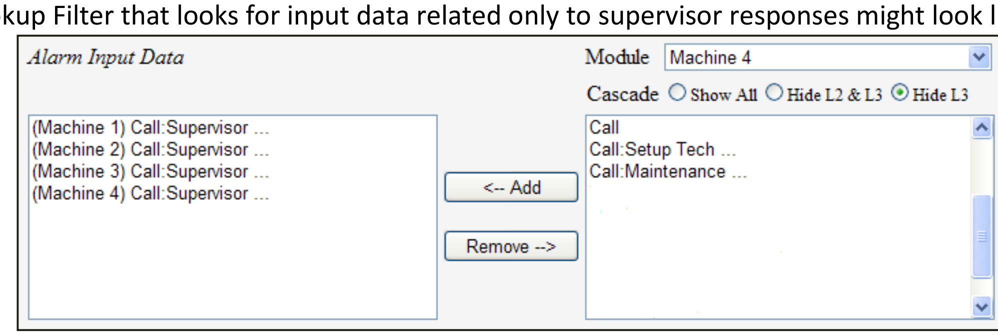


NOTE: The right side of the screen holds *available data pieces*. Once they are added to the Lookup Filter, they are no longer available unless they are removed.

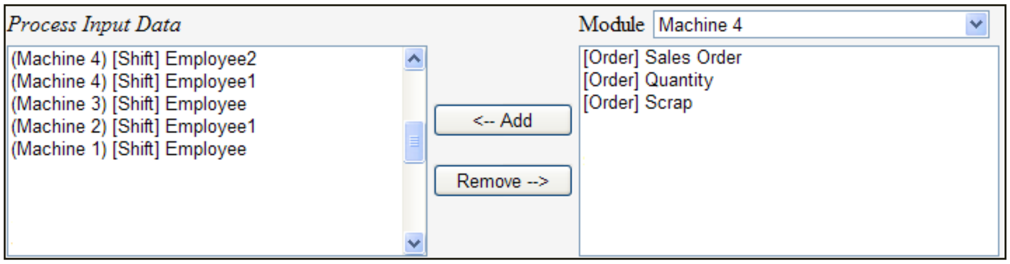
When complete with adding desired information pieces for each information type, click **Save** located at the top of the page

Example Lookup Filters

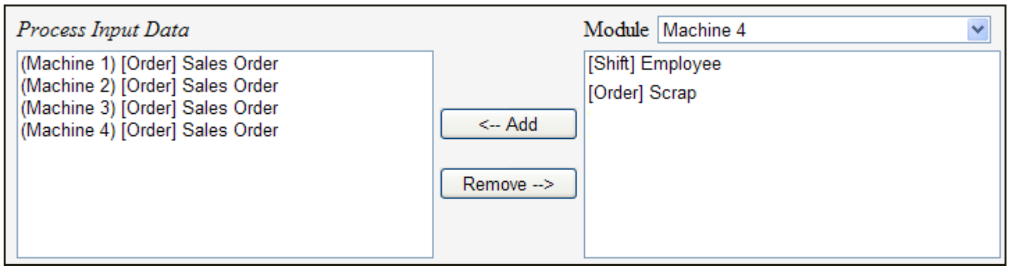
- A Lookup Filter that looks for input data related only to supervisor responses might look like this:



- A Lookup Filter that looks for input data related only to employees might look like this:



- A Lookup Filter that looks for input data related only to work orders might look like this



About Cascading

Cascading allows you to add tiered alarms more quickly. Cascading applies if you have multi-level alarms and you want to add all alarms under a certain level.

Show All Select this option if you are adding alarms one by one.

Hide L2 & L3 Select if you want to choose a Level 1 alarm <u>and</u> you want to include all the Level 2 and Level 3 alarms beneath it.

Hide L3 Select if you want to choose a Level 2 alarm <u>and</u> you want to include all the Level 3 alarms beneath it.

Running Reports

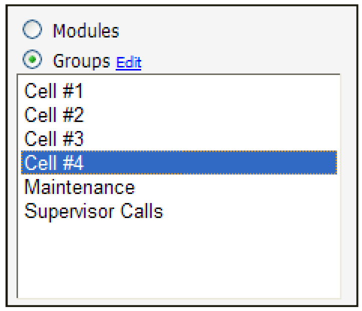
Ad Hoc Reports

Running an Ad Hoc Report allows you to run “On the Fly” reports. We recommend that beginning users start here to get familiar with the way reports work. When you reach a certain level of understanding, you may want to move on to Pre-Configured and/or Scheduled Reports to save time.

To run an Ad-Hoc Report:

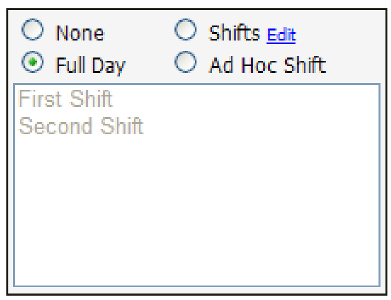
1. Go to the VRS Main page
2. Click **Reports**
3. Select a **Start Date**
4. Select an **End Date**

5. Select a Data Source type – either **Modules** or **Groups** – and data sources(s). Selecting **Modules** does not filter information. Selecting **Groups** filters information based on the group you created.

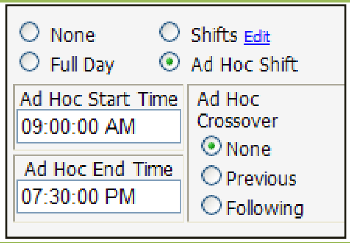


NOTE: Certain reports require that you run it by a group. Other reports work if you select a module, but may make more sense if you create a group and run the report by that group. For example, if you only want to see maintenance response times in a Total Response Time Report, you may want to create a group that includes only Maintenance alarms. *See Editing Groups for more information*.

6. Select a Time Period – **None**, **Full Day**, **Shifts or Ad Hoc Shift**



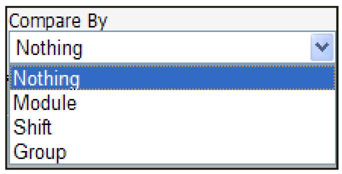
None	Does not filter by any time at all. Any alarms will be shown in their entirety. If an alarm starts on one day and ends in another, it appears like it all occurred on the day it started. You could have an alarm that lasts over 24 hours on a given day.
Full Day	Filters by the Full Day shift. If an alarm starts on one day and ends in another it will be split into two instances of the alarm. *See Editing Shifts for more information on the Full Day definition.*
Shifts	Filters by the selected Shift(s). If an alarm starts in one shift and ends in another it will be split into two instances of the alarm. *See Editing Shifts for more information.*
Ad Hoc Shift	Filters by shifts created on the spot. *See Editing Shifts above for more information on filling out each field.*



7. (Optional) Select a Compare By option. Selecting a Compare By option results in a report with multiple bars for each Compare By item.

   The default Compare By option is **Nothing**. **Group** appears only if you selected Group as your Data Source type. **Shift** appears only if you selected Shift as your Time Period.

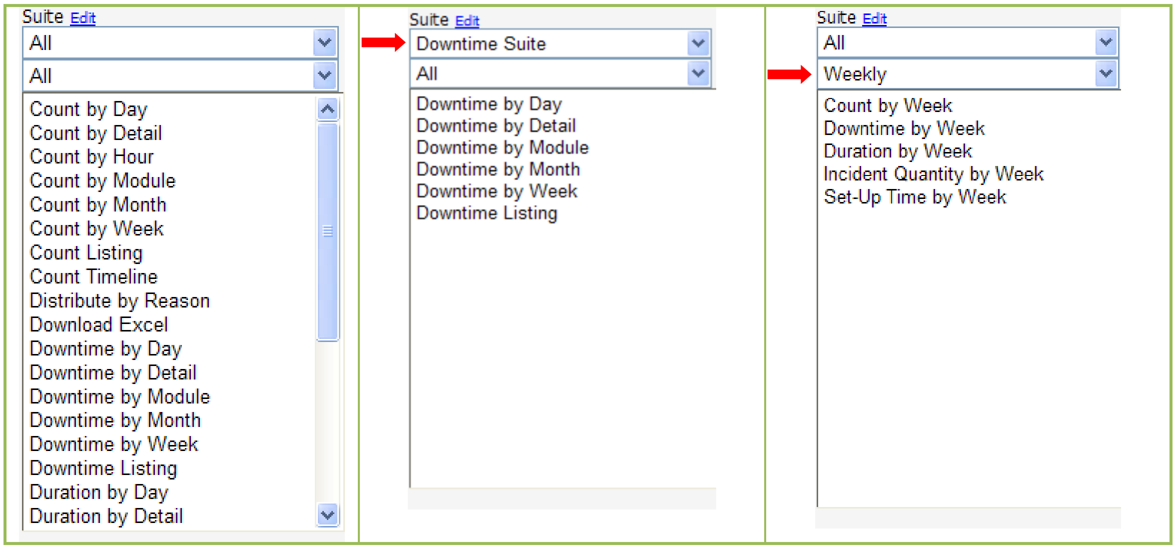
NOTE: Tabular reports and some others do not support the Compare By option.



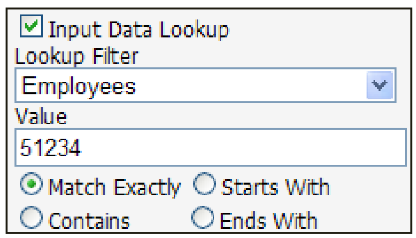
8. Select a Report to run

   Reports appear here once the suite has been uploaded. (*See Uploading a Reporting Suite for more information.*) This section has two drop down lists that filter the reports you see in the Reports list.

When **All** is select for both drop down lists in this section, you see all reports available to you.	If you select a reporting suite name from the top drop down list, you see all the reports belonging to the selected suite.	If you select a report type from the bottom drop down list, you can see reports of the selected type from each suite.

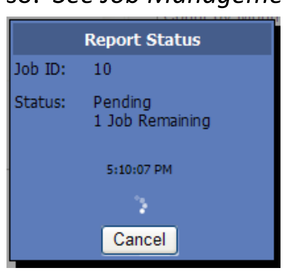


9. If you want to filter your report by an input data value, check the box next to **Input Data Lookup**. Otherwise, skip to step 13.



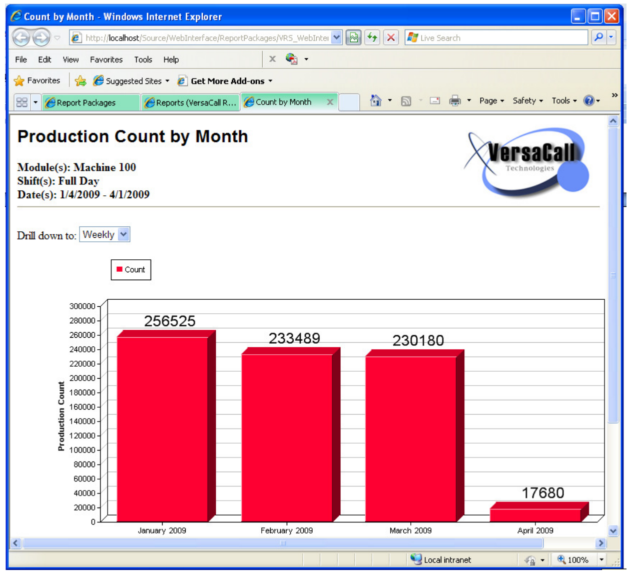
10. Select a **Lookup Filter** or **None**. *See Editing Lookup Filters for more information*.
11. Enter an input data **Value**. This can be a specific part number, work order number, employee id or any other input data value your system is configured to accept. This field accepts comma separated values if you wish to search by more than one value.
12. Choose how you would like to conduct your search. Searches are NOT case sensitive.
13. Click **Submit**.

A status box appears while the system gathers information. If other jobs are running concurrently, the status will indicate so. *See Job Management for more information.*



Once information is gathered, the report loads in a new window or tab (depending on your browser settings).

NOTE: You may need to configure your browser to allow pop-ups from the VT2000 System.



For more information on web report features, see *Appendix: Common Web Report Features*

Pre-Configured Reports

Pre-Configured Reports are similar to Ad-Hoc reports except they allow you to select options for the report once and then skip these steps thereafter. When you run a Pre-Configured report you can choose the report from a list and then run it with the saved options in one or two steps.

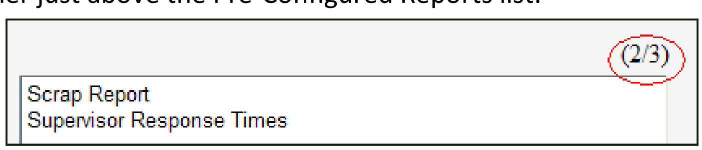
Setting Up a Pre-Configured Report

To setup a Pre-Configured Report:

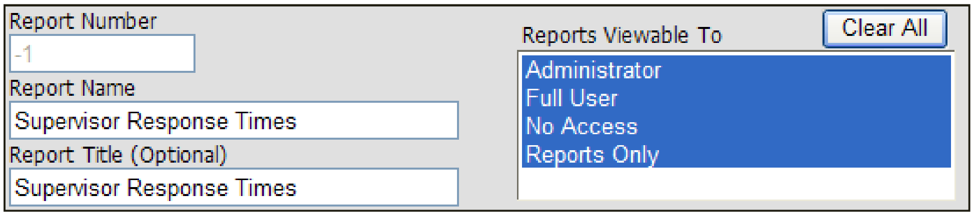
1. Go to the VRS Main page
2. Click **Pre-Configured Reports**
3. Click **Edit**

4. Click **Add.**

If you have not exceeded your allotted Pre-Configured Report slots, you can proceed to the next step. If you have exceeded your allotted Pre-Configured Report slots, you can contact a VersaCall Representative to inquire about ordering more. The allotted slot number appears in the right hand corner just above the Pre-Configured Reports list.



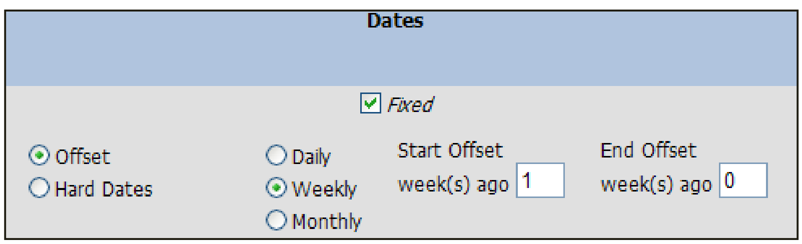
5. Fill in the first section



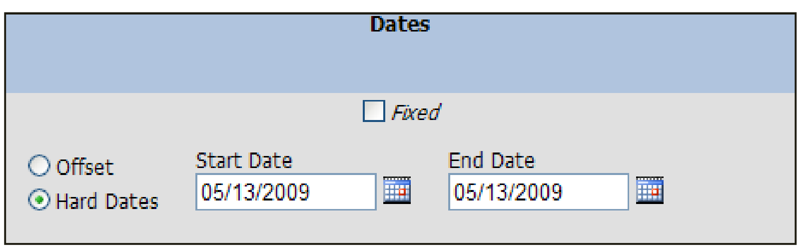
Report Number	An auto-generated number used internally by the system to manage Pre-Configured Reports (non-editable)
Report Name	Any meaningful name for your Pre-Configured Report. This is the name that appears in the Pre-Configured Reports list.
Report Title (Optional)	A title to appear on the report once it generates. If left blank, the default title appears on the report (i.e., Total Response Time by Day, Duration by Week, etc.)
Reports Viewable To	The user groups able to view and run this report. If a user group is not selected, members of that user group will not be able to view or run this report.

6. Next, choose your date ranges

<u>Offset Selection</u>



<u>Hard Dates Selection</u>

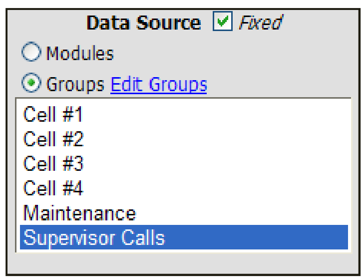


Fixed	Uncheck if you want the option to adjust the Date Range each time you run the report. Check if you do not want this option.
Offset	Allows you to choose how far back you want to go when running a report without choosing specific dates
Daily	Calculates offset by days

Weekly	Calculates offset by weeks
Monthly	Calculates offset by months
Start Offset	Determines the start date of your Pre-Configured Report. The number entered here is how far back you want to go (in days, weeks, or months depending on your selection)
End Offset	Determines the end date of your Pre-Configured Report. The number entered here is how far back you want to go (in days, weeks, or months depending on your selection)
Hard Dates	Allows you to choose specific dates for your Pre-Configured Report
Start Date	The start date for your Pre-Configured Report
End Date	The end date for your Pre-Configured Report

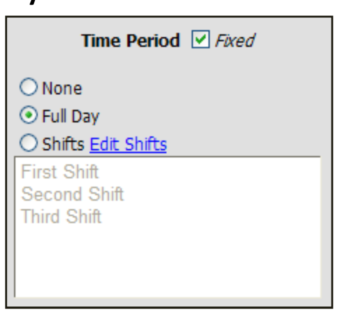
7. Select a Data Source type – either **Modules** or **Groups** – and data source(s). Selecting **Modules** does not filter information. Selecting **Groups** filters information based on the group you created.

   Uncheck **Fixed** if you want the option to adjust the Data Source each time you run the report. Check if you do not want this option.

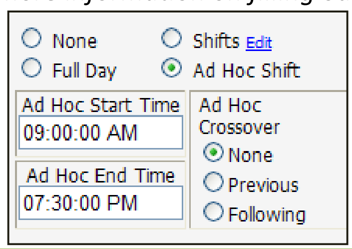


NOTE: Certain reports require that you run it by a group. Other reports work if you select a module, but may make more sense if you create a group and run the report by that group. For example, if you only want to see maintenance response times in a Total Response Time Report, you may want to create a group that includes only Maintenance alarms. *See Editing Groups for more information*.

8. Select a Time Period – **None**, **Full Day** or **Shifts**



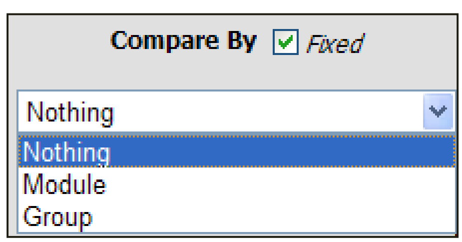
Fixed	Uncheck if you want the option to adjust the Time Period each time you run the report. Check if you do not want this option.
None	Does not filter by any time at all. Any alarms will be shown in their entirety. If an alarm starts on one day and ends in another, it appears like it all occurred on the day it started. You could have an alarm that lasts over 24 hours on a given day.
Full Day	Filters by the Full Day shift. If an alarm starts on one day and ends in another it will be split into two instances of the alarm. *See Editing Shifts for more information on the Full Day definition.*
Shifts	Filters by the selected Shift(s). If an alarm starts in one shift and ends in another it will be split into two instances of the alarm. *See Editing Shifts for more information.*
Ad Hoc Shift	Filters by shifts created on the spot. *See Editing Shifts for more information on filling out each field.*



9. (Optional) Select a Compare By option. Selecting a Compare By option results in a report with multiple bars for each Compare By item.

   The default Compare By option is **Nothing**. **Group** appears only if you selected Group as your Data Source type. **Shift** appears only if you selected Shift as your Time Period.

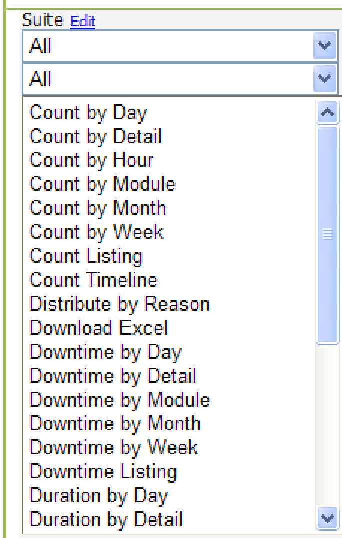
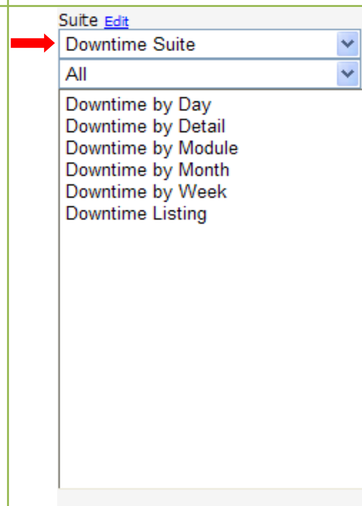
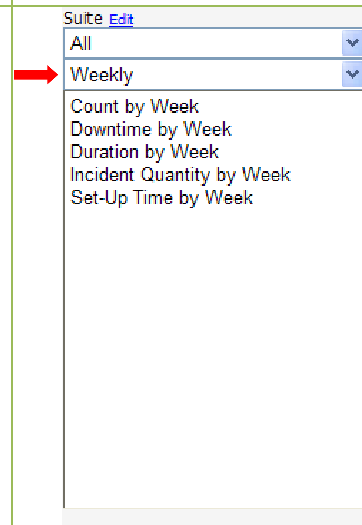
   Uncheck **Fixed** if you want the option to adjust the Compare By selection each time you run the report. Check if you do not want this option.



10. Select a Report to run

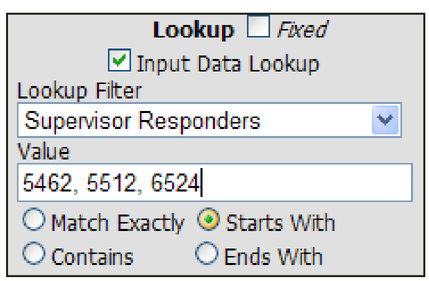
    Uncheck **Fixed** if you want the option to adjust the Report each time you run the report. Check if you do not want this option.

Reports appear here once the suite has been uploaded. (*See Uploading a Reporting Suite for more information.*) This section has two drop down lists that filter the reports you see in the Reports list.

<table>
<tr><th></th><th></th><th></th></tr>
<tr><td>When All is select for both drop down lists in this section, you see all reports available to you.</td><td>If you select a reporting suite name from the top drop down list, you see all the reports belonging to the selected suite.</td><td>If you select a report type from the bottom drop down list, you can see reports of the selected type from each suite.</td></tr>
<tr><td>
</td><td>
</td><td>
</td></tr>
</table>

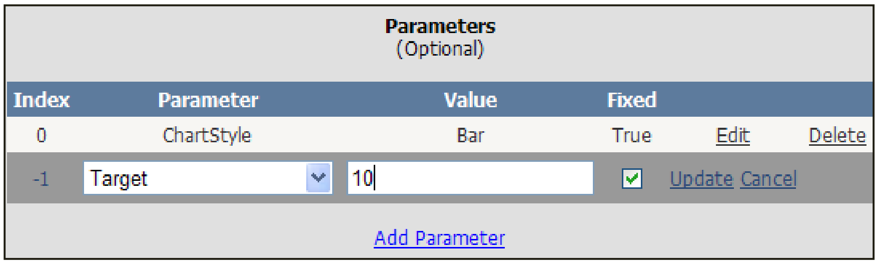
11. If you want to filter your report by an input data value, check the box next to **Input Data Lookup**. Otherwise, skip to step 15.

    Uncheck **Fixed** if you want the option to adjust the Input Data Lookup option each time you run the report.



12. Select a **Lookup Filter** or **None**. *See Editing Lookup Filters for more information*.
13. Enter an input data **Value**. This can be a specific part number, work order number, employee id or any other input data value your system is configured to accept. This field accepts comma separated values if you wish to search by more than one value.

14. Choose how you would like to conduct your search.
15. (Optional) Select one or more parameters for your Pre-Configured Report. Parameters are a way to pre-set features that are available in Ad Hoc reports. This option is not widely used and is available only to custom reports at the moment. If your custom reports require the use of parameters, the VersaCall Representative assisting you can provide you with details on the required parameters.



Add Parameter	Click to add a new parameter to the list. There is no limit for how many parameters you can add.
Index	An auto-incremented number used by the system to manage Scheduled Report parameters (non-editable)
Parameter	The parameter name to use in the Pre-Configured Report
Value	The value associated with the corresponding parameter
Fixed	Uncheck if you want the option to adjust the parameter value each time you run the report. Check if you do not want this option
Update	Save parameter
Cancel	Cancel parameter
Edit	Edit parameter
Delete	Delete parameter

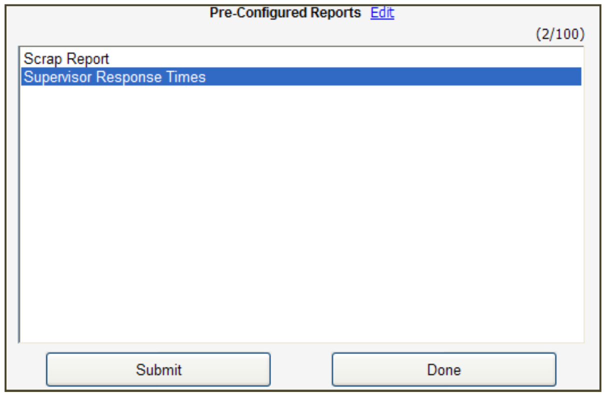
16. Click **Save**, located at the top of the screen.

Running a Pre-Configured Report

Once you setup a Pre-Configured Report, you can run the report without having to make any selections for fixed parameters. You can run the report in just a few simple steps.

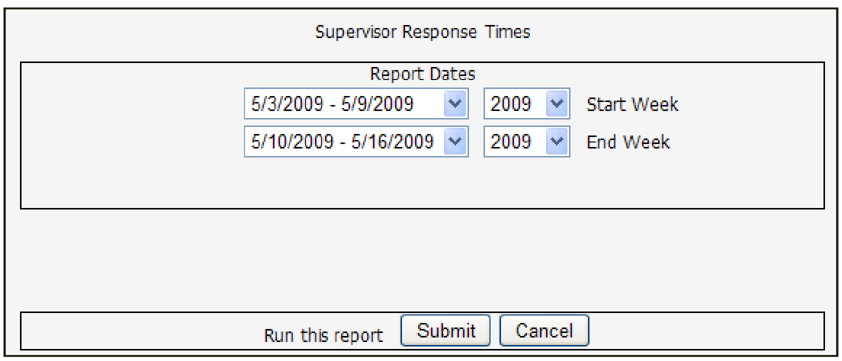
To run a Pre-Configured Report:

1. Go to the VRS Main page
2. Click **Pre-Configured Reports**
3. Select the name of the report you want to run from the Pre-Configured Reports list



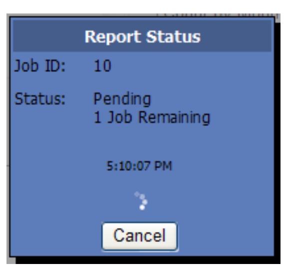
4. Click **Submit**

If your Pre-Configured Report includes an option with a non-fixed setting, you will be taken to a Validate Fixed Settings page before your report generates. On the validate settings page, you have the option to modify any options that were configured as non-fixed. You can leave the selections as they are and click **Submit**, or you can modify the selections and then click **Submit**.



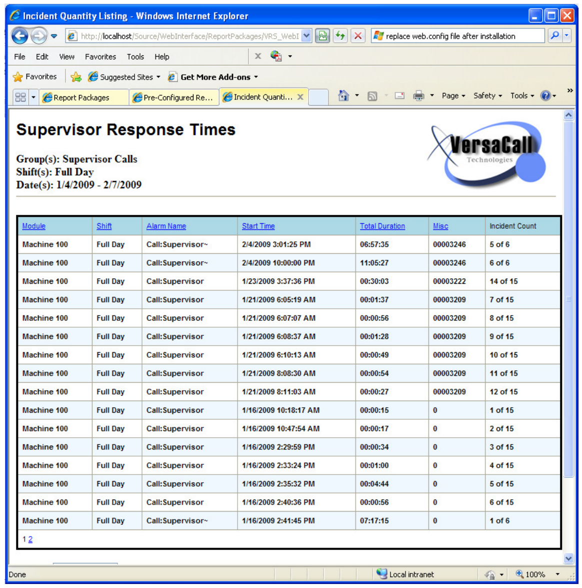
If your Pre-Configured Report does not include any non-fixed settings, you will skip this page.

When report processing begins, a status box appears. If other jobs are running concurrently, the status indicates so. *See Job Management for more information.*



Once information is gathered, the report loads in a new window or tab (depending on your browser settings).

NOTE: You may need to configure your browser to allow pop-ups from the VT2000 System.



Supervisor Response Times

Group(s): Supervisor Calls
Shift(s): Full Day
Date(s): 1/4/2009 - 2/7/2009

Module	Shift	Alarm Name	Start Time	Total Duration	Misc	Incident Count
Machine 100	Full Day	Call:Supervisor~	2/4/2009 3:01:25 PM	06:57:35	00003246	5 of 6
Machine 100	Full Day	Call:Supervisor~	2/4/2009 10:00:00 PM	11:05:27	00003246	6 of 6
Machine 100	Full Day	Call:Supervisor	1/23/2009 3:37:36 PM	00:30:03	00003222	14 of 15
Machine 100	Full Day	Call:Supervisor	1/21/2009 6:05:19 AM	00:01:37	00003209	7 of 15
Machine 100	Full Day	Call:Supervisor	1/21/2009 6:07:07 AM	00:00:56	00003209	8 of 15
Machine 100	Full Day	Call:Supervisor	1/21/2009 6:08:37 AM	00:01:28	00003209	9 of 15
Machine 100	Full Day	Call:Supervisor	1/21/2009 6:10:13 AM	00:00:49	00003209	10 of 15
Machine 100	Full Day	Call:Supervisor	1/21/2009 8:08:30 AM	00:00:54	00003209	11 of 15
Machine 100	Full Day	Call:Supervisor	1/21/2009 8:11:03 AM	00:00:27	00003209	12 of 15
Machine 100	Full Day	Call:Supervisor	1/16/2009 10:18:17 AM	00:00:15	0	1 of 15
Machine 100	Full Day	Call:Supervisor	1/16/2009 10:47:54 AM	00:00:17	0	2 of 15
Machine 100	Full Day	Call:Supervisor	1/16/2009 2:29:59 PM	00:00:34	0	3 of 15
Machine 100	Full Day	Call:Supervisor	1/16/2009 2:33:24 PM	00:01:00	0	4 of 15
Machine 100	Full Day	Call:Supervisor	1/16/2009 2:35:32 PM	00:04:44	0	5 of 15
Machine 100	Full Day	Call:Supervisor	1/16/2009 2:40:36 PM	00:00:56	0	6 of 15
Machine 100	Full Day	Call:Supervisor~	1/16/2009 2:41:45 PM	07:17:15	0	1 of 6

1 2

For more information on web report features, see *Appendix: Common Web Report Features*

Pre-Configured Report Shortcuts

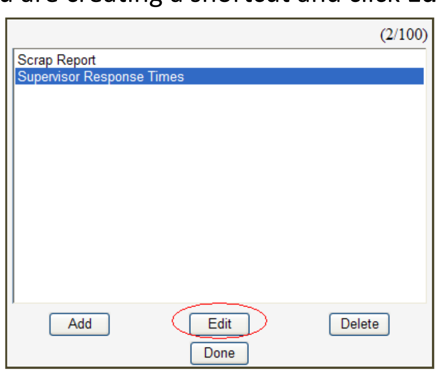
(Available in VRS Build v1.0.2 and above)

Once you have setup your pre-configured report, you can create a shortcut icon to access this report directly.

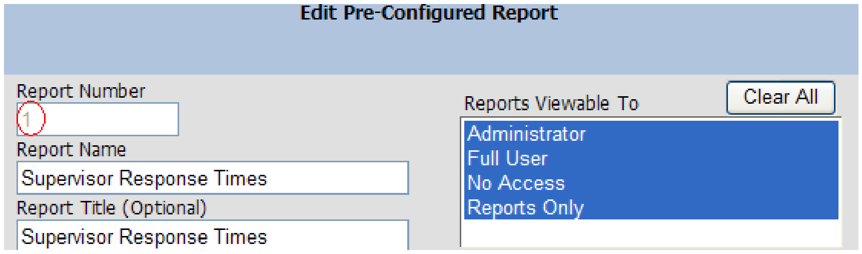
To create a Pre-Configured Report shortcut:

1. Go to the VRS Main page
2. Click **Pre-Configured Reports**
3. Click **Edit**

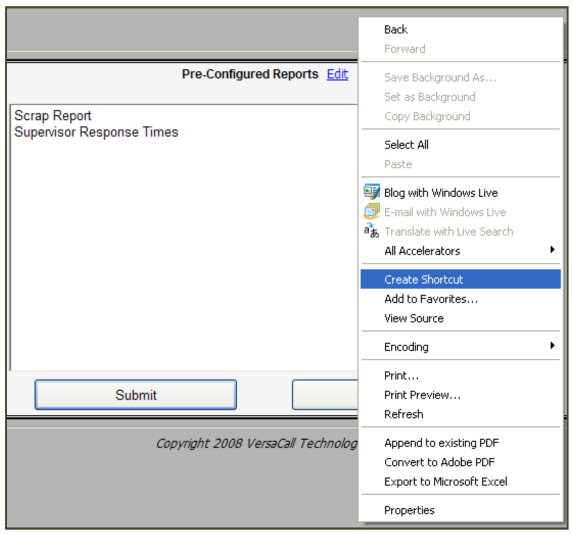
4. Select the report for which you are creating a shortcut and click **Edit.**



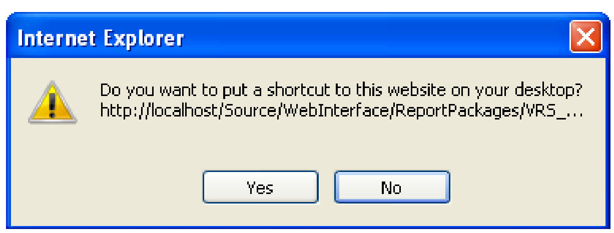
5. Make note of the **Report Number** and then cancel out of this page.



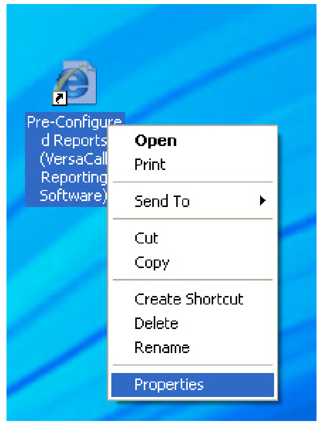
6. From the VRS Main page, click Pre-Configured Reports to return to the Pre-Configured Reports page.
7. When you arrive at the Pre-Configured Reports page, <u>right-click on the page</u> and select **Create Shortcut**



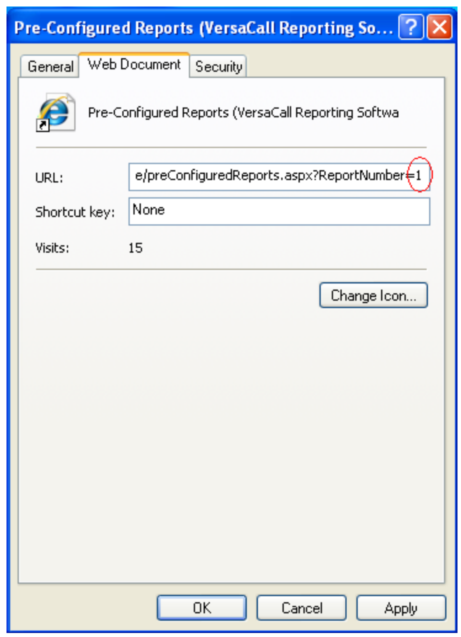
8. Allow your browser to save the file



9. Find the file on your desktop or wherever it saved. Right-click on the file and select **Properties**.



10. A menu pops up. Select the **Web Documentation** tab and find the URL field. Add the report number you noted above to the end of the URL.



11. Click **Apply** and then **OK**.
12. You can now double click on the icon to run the report.

Scheduled (Automatic) Reports

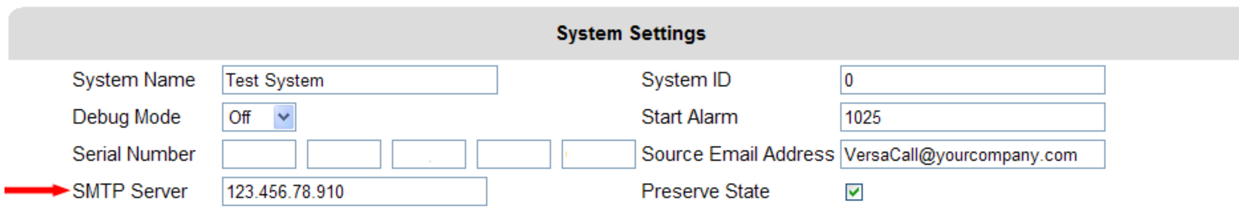
Scheduled Reports require even fewer steps than Pre-Configured Reports. With Scheduled Reports, you can select options for the report once and then have the reports emailed to you without logging in to VRS.

Checking SMTP Server Settings and Source Email Address

In order to run Scheduled Reports, the SMTP Server settings must be set correctly in the main VT2000 Web Interface. If you are already using the VT2000 System to receive email alerts for communications, you already have this set correctly. Otherwise, you may want to check these settings.

To check your SMTP settings:

1. Go to the main VT2000 Web Interface
2. Click the **Administration** tab
3. Click **System Settings**
4. Check that the **SMTP Server** address has been filled in and that it is correct. You may require assistance from your IT Department.



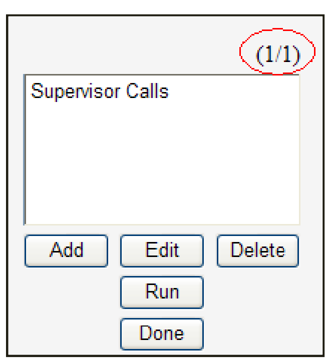
5. **(Optional)** The **Source Email Address** is the email address used in the **From** line for emails sent out by the VT2000 System. You may need to work with your IT Department to set up an email account for the VersaCall System.

Setting up a Scheduled Report

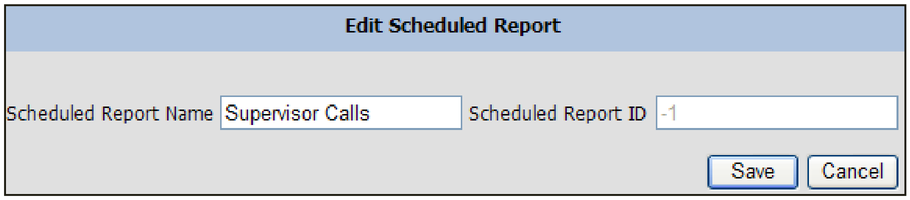
To setup a Scheduled Report:

1. Go to the VRS Main page
2. Click **Scheduled Reports**
3. Click **Add**

If you have not exceeded your allotted Scheduled Report slots, you can proceed to the next step. If you have exceeded your allotted Scheduled Report slots, you can contact a VersaCall Representative to inquire about ordering more. The allotted slot number appears in the right hand corner just above the Scheduled Reports list.

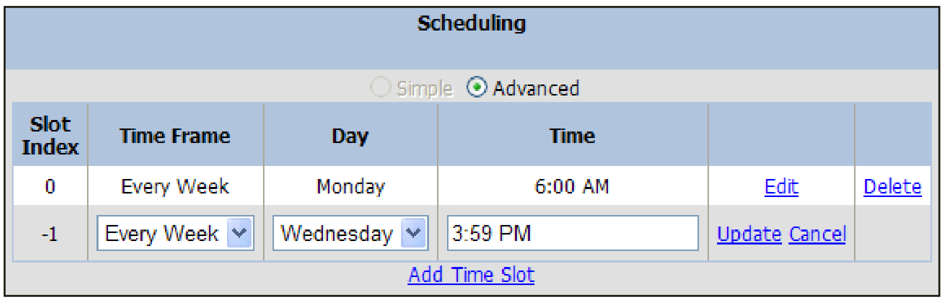


4. Fill in the first section



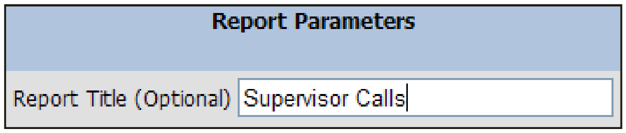
Scheduled Report Name	Any meaningful name for your report
Scheduled Report ID	An auto-generated number used internally by the system to manage Scheduled Reports (non-editable)

5. Fill in the Scheduling section. This section sets the time(s) for your reports to be emailed out.



Simple	Option not yet implemented (Disabled)
Advanced	Gives you more choices for scheduling (currently non-editable)
Add Time Slot	Click to enable time slot editing options
Slot Index	An auto-incremented number used internally by the system to manage scheduled time slots (non-editable)
Time Frame	The frequency for sending for sending out reports
Every Week	Scheduling selections apply weekly. This is the only option at the moment. *Future option may include Every Month so that selections apply to the month.*
Day	Scheduled day(s) for report delivery.
Time	Scheduled time for report delivery
Edit	Edit time slot
Delete	Delete time slot
Update	Save report time slot
Cancel	Cancel time slot

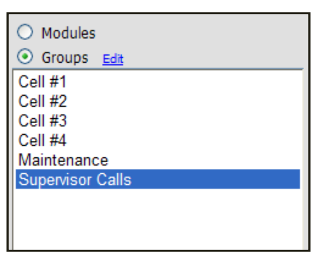
6. (Optional) Fill in **Report Title** – The Report Title set here appears in the email subject line, is the name of the generated report file and also overwrites the default report header (i.e, Downtime by Day, Downtime by Month, etc.). If left blank, the email subject line is blank when the system emails the report; the report header and the report filename use the default header name. The title has a 31 character limit due to file name restrictions.



7. Select Dates

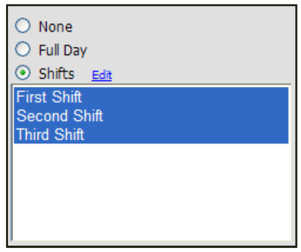
Daily	Calculates offset by days
Weekly	Calculates offset by weeks
Monthly	Calculates offset by Months
Quarterly	Not yet supported
Yearly	Not yet supported
Start Offset	Determines the start date of your Scheduled Report. The number entered here is how far back you want to go (in days, weeks, or months depending on your selection)
End Offset	Determines the end date of your Scheduled Report. The number entered here is how far back you want to go (in days, weeks, or months depending on your selection)

8. Select a Data Source type – either **Modules** or **Groups** – and data source(s). Selecting **Modules** does not filter information. Selecting **Groups** filters information based on the group you created.

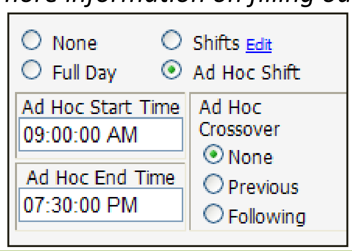


NOTE: Certain reports require that you run it by a group. Other reports work if you select a module, but may make more sense if you create a group and run the report by that group. For example, if you only want to see maintenance response times in a Total Response Time Report, you may want to create a group that includes only Maintenance alarms. *See Editing Groups for more information*.

9. Select a Time Period – **None**, **Full Day** or **Shifts**

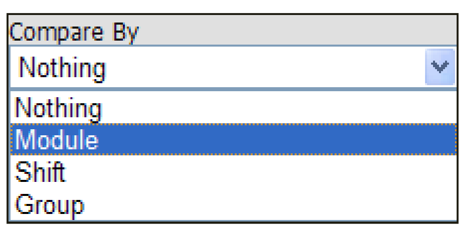


None	Does not filter by any time at all. Any alarms will be shown in their entirety. If an alarm starts on one day and ends in another, it appears like it all occurred on the day it started. You could have an alarm that lasts over 24 hours on a given day.
Full Day	Filters by the Full Day shift. If an alarm starts on one day and ends in another it will be split into two instances of the alarm. *See Editing Shifts for more information on the Full Day definition.*
Shifts	Filters by the selected Shift(s). If an alarm starts in one shift and ends in another it will be split into two instances of the alarm. *See Editing Shifts for more information.*
Ad Hoc Shift	Filters by shifts created on the spot. *See Editing Shifts for more information on filling out each field.*

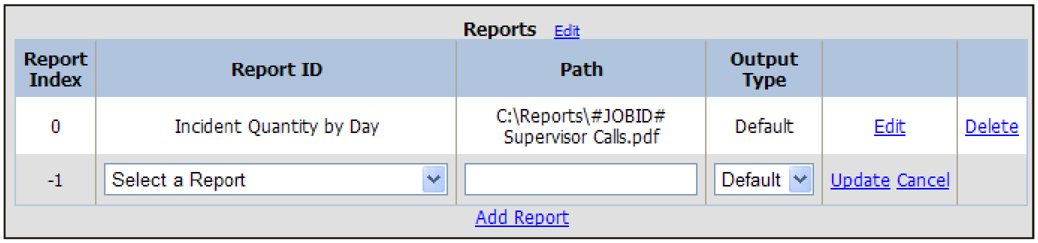


10. (Optional) Select a Compare By option. Selecting a Compare By option results in a report with multiple bars for each Compare By item.

    The default Compare By option is **Nothing**. **Group** appears only if you selected Group as your Data Source type. **Shift** appears only if you selected Shift as your Time Period.



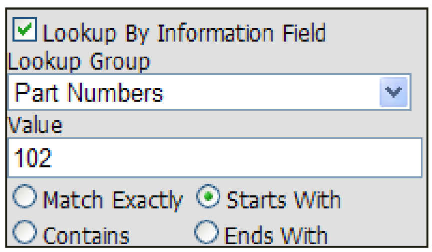
11. Select a Report to run



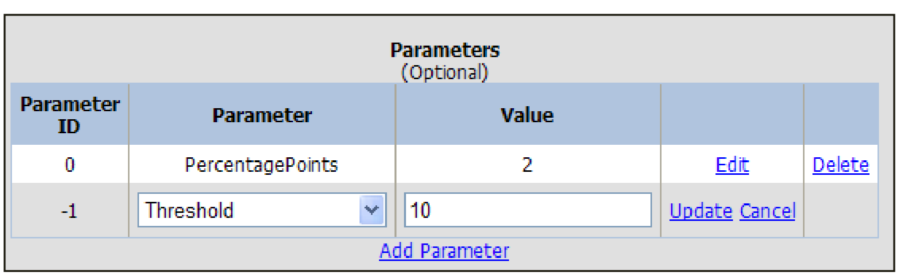
Add Report	Enable report editing options. System generates up to six reports per Scheduled Report setup.
Report Index	An auto-incremented number used internally by the system to manage reports (non-editable)
Report ID	Reports appear here once the suite has been uploaded. (*See Uploading a Reporting Suite for more information.*)
Path (Optional)	When an automatic report generates, a copy of the file is automatically saved to **C:\VersaCall Reporting Software\Auto Generated Reports**. However, you may want a copy of the file saved to a different location. In this case, enter a path to a location on the VT2000 System server where you want to save copies of report files. Be sure to include a file name and a file extension. The file extension should match the output type you select. **NOTE**: One reason for wanting to save a copy of the file to a different location may be for using the report image file in Virtual Panels II. *See Virtual Panels II Administrator Manual for more details.* ***Example:*** ***C:\Documents and Settings\John Smith\My Documents\My Reports\MyPDF.pdf*** You may include a date and/or time by placing date format between two pound(#) signs. ***Example:*** ***C:\Documents and Settings\John Smith\My Documents\My Reports\My PDF #DD-MM-YYYY#.pdf*** This example would produce the following file name: MyPDF 03-20-2009.pdf* *Actual date varies You may switch the Day-Month-Year format by switching around the order of DD MM & YYYY You may also place the Job ID in the file name by placing #JOBID# in the path ***Example:*** ***C:\Documents and Settings\John Smith\My Documents\My Reports\#JOBID# MyPDF.pdf***

	This example would produce the following filename: 12 MyPDF.pdf* * Actual Job ID varies
Output Type	Output types vary by report. Output type reverts to default if the automatically generated report does not support your selection.
Default	Pre-set file type – usually PDF
PDF	PDF document (.pdf)
Excel	Excel Spreadsheet (.xls) Currently, this option is only supported by the Download Excel report
Image	Image file (.jpg)
Text	Text file (.txt)
Edit	Edit report
Delete	Delete report
Update	Save report
Cancel	Cancel report

17. If you want to filter your report by an input data value, check the box next to **Input Data Lookup**. Otherwise, skip to step 13.

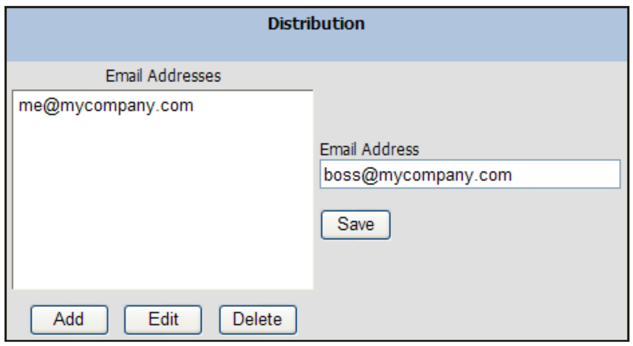


18. Select a **Lookup Filter** or **None**. *See Editing Lookup Filters for more information*.
19. Enter an input data **Value**. This can be a specific part number, work order number, employee id or any other input data value your system is configured to accept. This field accepts comma separated values if you wish to search by more than one value.
12. Choose how you would like to conduct your search
13. (Optional) Select one or more parameters for your Scheduled Report. Parameters are a way to pre-set features that are available in Ad Hoc reports. This option is not widely used and is available only to custom reports at the moment. If your custom reports require the use of parameters, the VersaCall Representative assisting you can provide you with details on the required parameters.



Add Parameter	Click to add a new parameter to the list. There is no limit for how many parameters you can add.
Index	An auto-incremented number used by the system to manage Scheduled Report parameters (non-editable)
Parameter	The parameter name to use in the Scheduled Report
Value	The value associated with the corresponding parameter
Update	Save parameter
Cancel	Cancel parameter
Edit	Edit parameter
Delete	Delete parameter

14. Enter the email address(es) for the recipients of this Scheduled Report(s)



a. Click **Add** to add an email address. This enables the Email Address field to the right.
b. Click **Save**
c. Repeat steps a and b to add multiple email addresses

15. Click **Save** at the top of the page to save the Scheduled Report.

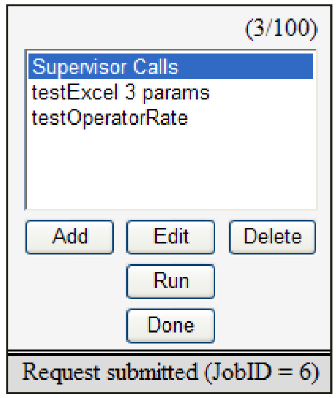
Running a Scheduled Report

Once you setup a scheduled report, you do not have to do anything. The report should appear in your inbox at the scheduled day and time. You may, however, want to test your Scheduled Report settings by following the steps below.

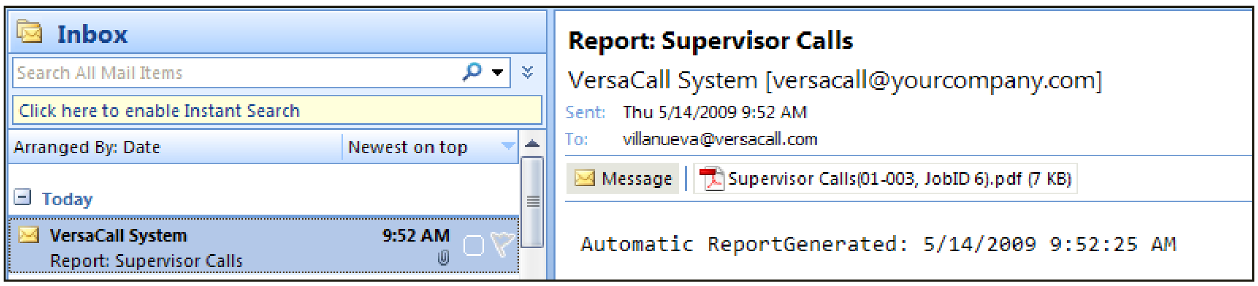
You can initiate a Scheduled Report to run immediately if you want to test your Scheduled Report settings or for any other reason.

To immediately run a Scheduled Report:

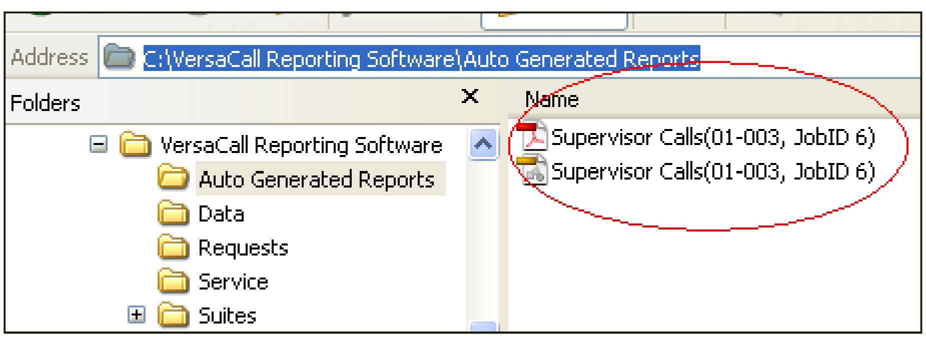
1. Go to the VRS Main page
2. Click **Scheduled Reports**
3. Select the Scheduled Report you want to run from the list and click **Run.** A **Request Submitted** message appears at the bottom.



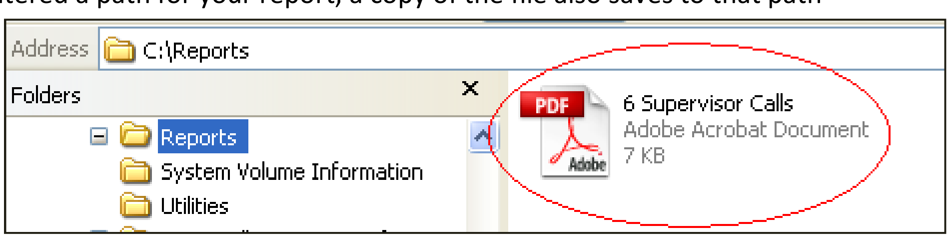
If successful, the report appears in your inbox.



A copy of the file automatically generates and saves to **C:\VersaCall Reporting Software\Auto Generated Reports** on the VT2000 System server



If you entered a path for your report, a copy of the file also saves to that path



Troubleshooting Scheduled Reports

If your report does not appear in your inbox and/or you do not see the file in the **C:\VersaCall Reporting Software\Auto Generated Reports**, one of the following may be your case:

- The VRS Service is processing other reports in the system and has not begun to process yours
  See Job Management for more information

- Your report is taking some time to process
  See Job Management for more information

- Your start date is after your end date – check the Start Offset and End Offset settings in your Scheduled Report

- You have chosen dates for which there is no data – try adjusting the Start Offset and End offset settings if you know there should be data

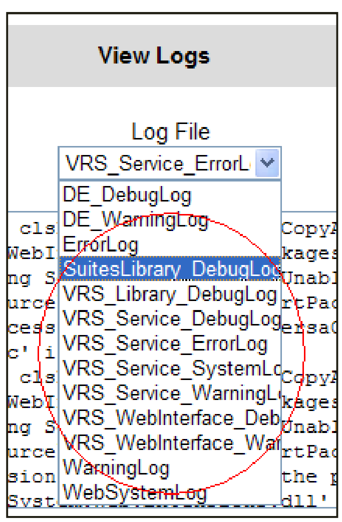
- You forgot to select one of the required parameters, i.e., you forgot to choose a data source or a report.

- Your SMTP Server Settings are not set correctly. *See Checking SMTP and Source Email Address for more information.*

If your scheduled report still does not run, you may want to check the Log files for additional clues.

To check the log files:

1. Go to the VT2000 Main Web Interface
2. Click the **Administration** tab
3. Click **Logs**
4. Look for logs that begin with VRS in the drop down list. The Suites Library log may also apply. Select a log and view the entries in the log to search for clues. A VersaCall Representative can provide assistance with this if necessary.



Job Management

The Job Management page allows you to check the queue status of actively running jobs. The VRS Service processes one report at time. When reports are run, they line up in a queue and must wait until reports before it have been processed. When a report completes, it is removed from the queue.

The Job Management page provides the following option and information:

Refresh	Immediately refreshes the page. Page automatically refreshes every 10 seconds on its own.
Job ID	The Job ID assigned to the report
Status	Status of the report with the corresponding Job ID
Pending	Job has not begun processing. It is awaiting its turn
Running	Job is currently gathering and filtering data
Cancelled	Job has been cancelled and is in the process of abandoning
Aborted	Job has not been processed due to an error in configuration. Check log files for warnings.
User	The user running the report. VRS System indicates a Scheduled Report.

Appendix

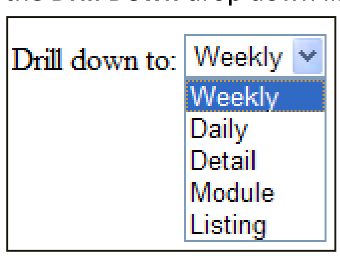
Common Web Report Features

Some or all of these features are available once the report generates:

- **Drill Down** (Bar Charts Only) - Allows you to “zoom in” on information.

  To Drill Down:

  1. Select an option from the **Drill Down** drop down list

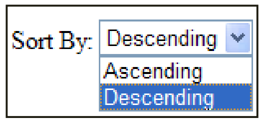


  2. Click on any bar on the bar chart to zoom in on that information.

- **Export to PDF** – Click View in PDF, located at the bottom of the screen, to generate a PDF version of the report.
- **Export to Excel** – Customers with the Download Excel Suite can click View in Excel, located at the bottom of the screen, to view an Excel version of the report.
- **Sorting** (Tabular Reports Only) – Click on the header of any column to sort by that field.

Module	Shift	Alarm Name	Start Time	Total Duration	Count
Machine 100	Full Day	Shift Count	1/19/2009 6:03:11 AM	08:19:21	4082
Machine 100	Full Day	Piece Count	1/19/2009 6:03:35 AM	03:06:54	2568
Machine 100	Full Day	Piece Count	1/19/2009 9:10:48 AM	01:48:25	1831
Machine 100	Full Day	Piece Count	1/19/2009 11:25:13 AM	02:18:56	3399

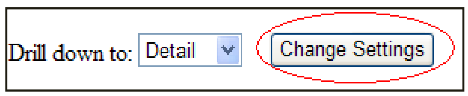
The list sorts in ascending or descending order, depending on the selection made in the **Sort By** drop down list.



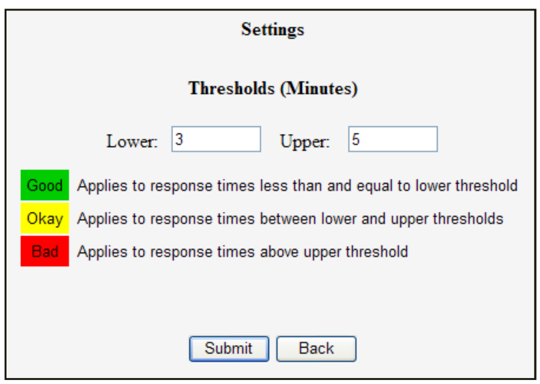
- **Settings** – Certain reports allow you to customize settings.

To change settings:

1. Click **Change Settings** to go to the settings page



2. Make your settings changes*



* Settings pages vary per reporting suite

3. Click **Submit** when complete to Save Settings
4. Click **Back** to return to report