CONNECT

Inspection Report New Feature – Using Templates

KEY2ACT

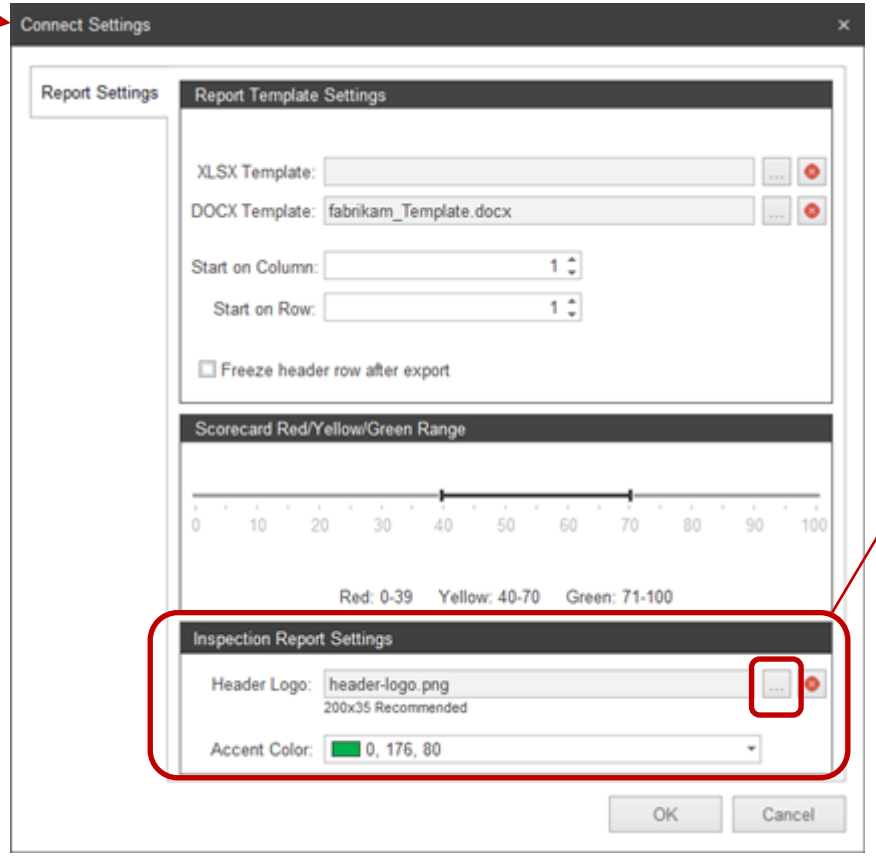
Inspection Report using Templates

Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Customizing the Logo

Click on the Settings icon.

The Connect Settings window will open.



Click on the … button and navigate to a logo file on your PC. Select a image file of your companies logo. Note that 200x35 is the recommended size.

The selected image file will be displayed at the top of each page in the Inspection report.

KEY2ACT

Inspection Report using Templates

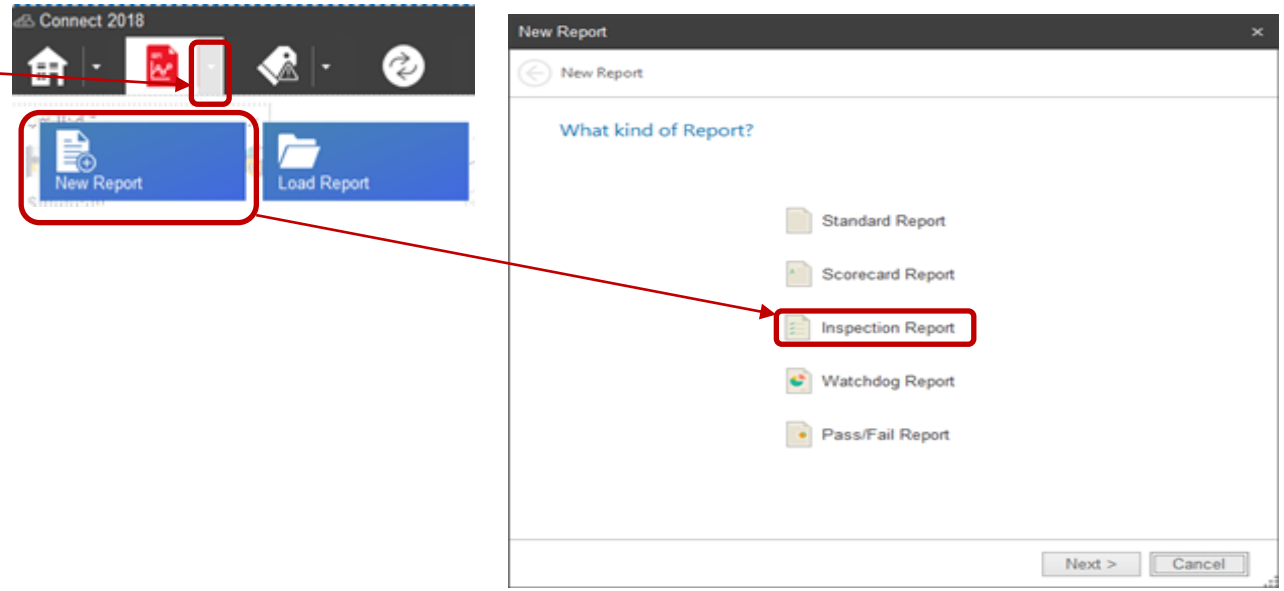
Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Choose the drop-down arrow to the right of the Reports icon.

Choose the New Report icon.

In the New Report window, choose *Inspection Report*.

Click *Next.*



KEY2ACT

Inspection Report using Templates

Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Configuration

The Edit Inspection report appears with the Configuration Tab window open.

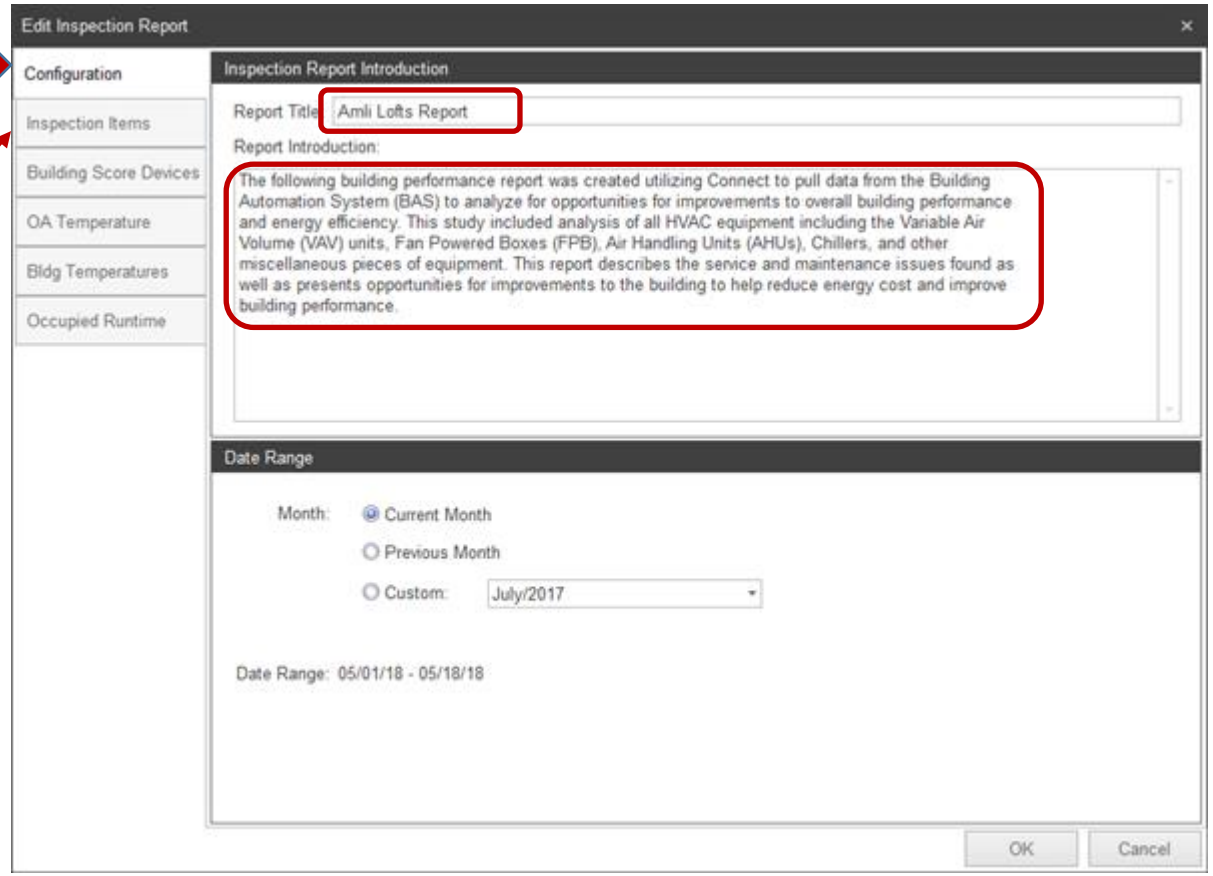
Enter the desired Report Title.

Enter the desired text into the Report Introduction box.

The Date Range will default to Current Month.

Do not click *Ok* at this time.

Click on the *Inspection Items* tab.



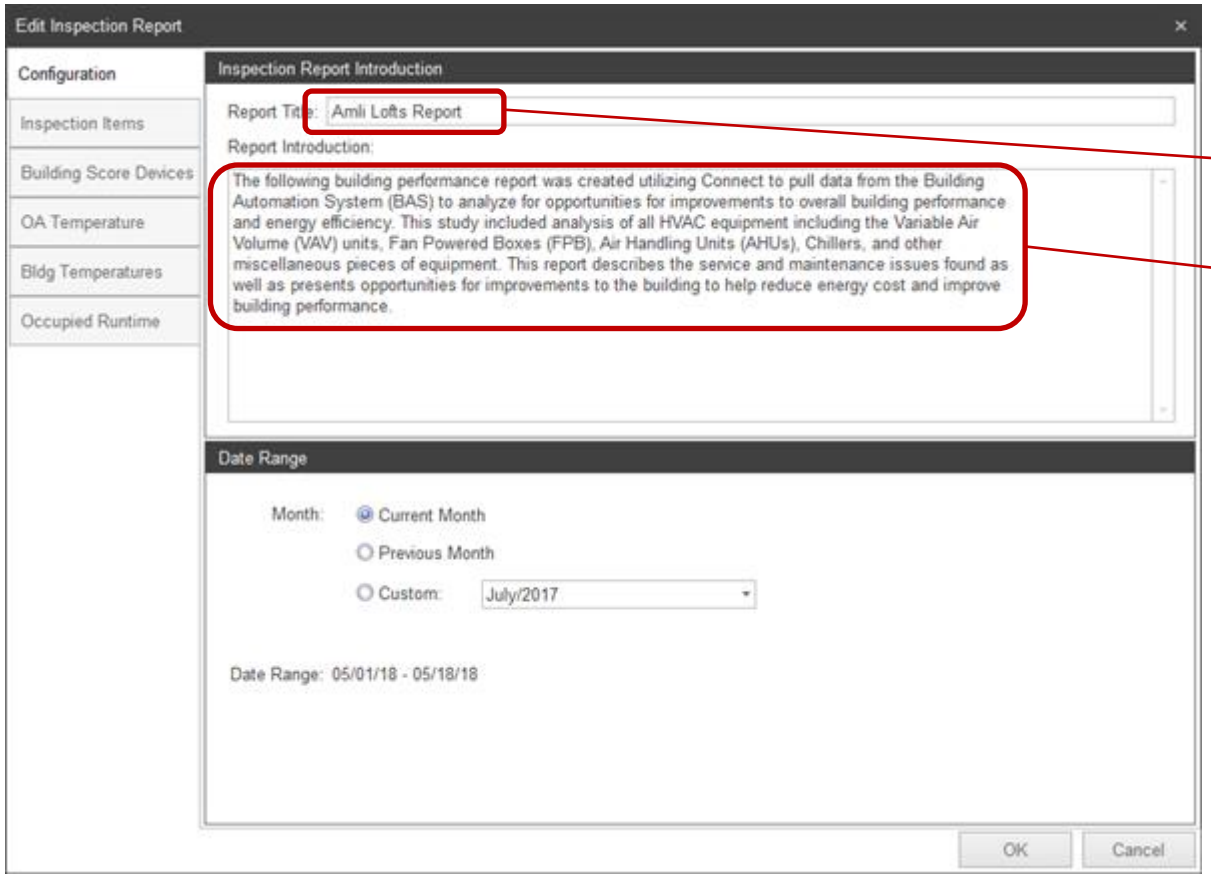
KEY2ACT

Inspection Report using Templates

Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Configuration

Example



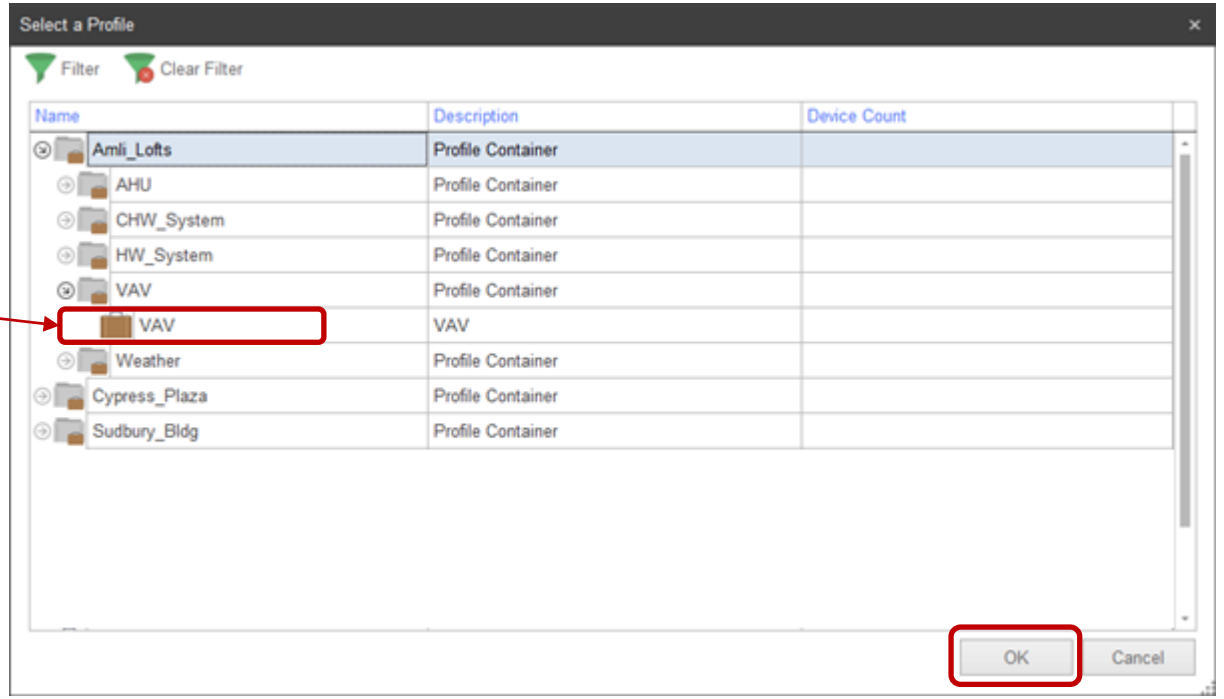
KEY2ACT

Inspection Report using Templates

Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Inspection Items

Choose the profile that contains a device class which will provide the mapped objects and templated events to be used in the report.



Click *Ok*.

If you wish to take advantage of the provided inspection item templates, Click *Yes*.

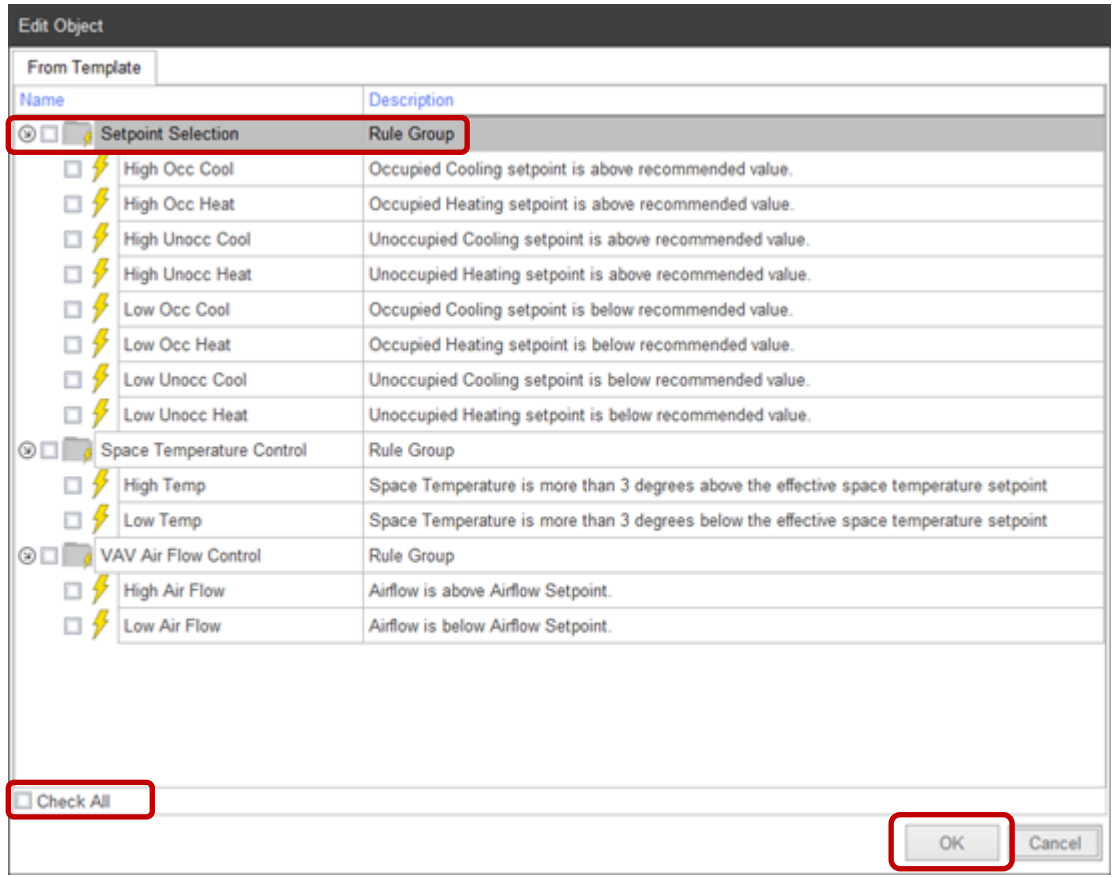
KEY2ACT

Inspection Report using Templates

Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Inspection Items

Select the desired Rule Groups, individual Rules or Check All.



Click *Ok.*

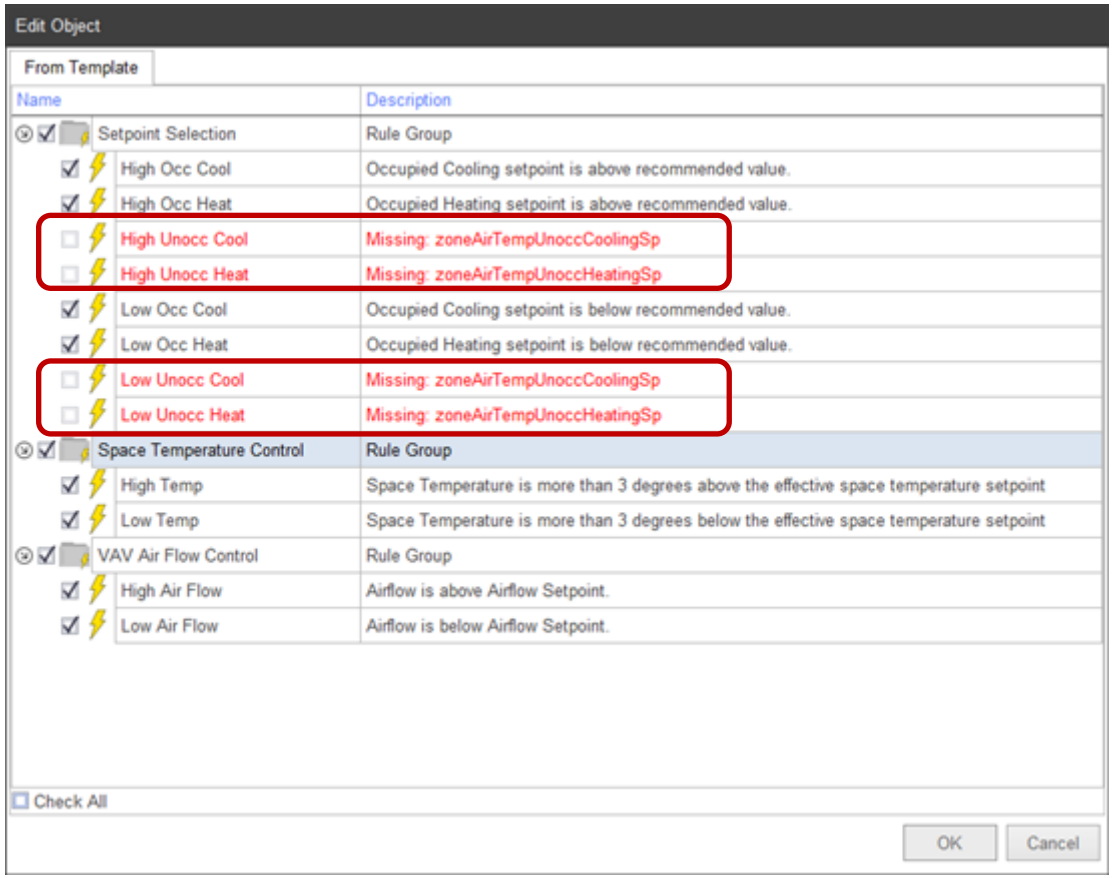
KEY2ACT

Inspection Report using Templates

Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Inspection Items

If a rule appears red, do not select it. The description cell will describe the reason this rule may not be applied.



Click *Ok.*

KEY2ACT

Inspection Report using Templates

Templates will provide access to templated creation of Inspection Items in Inspection Reports.

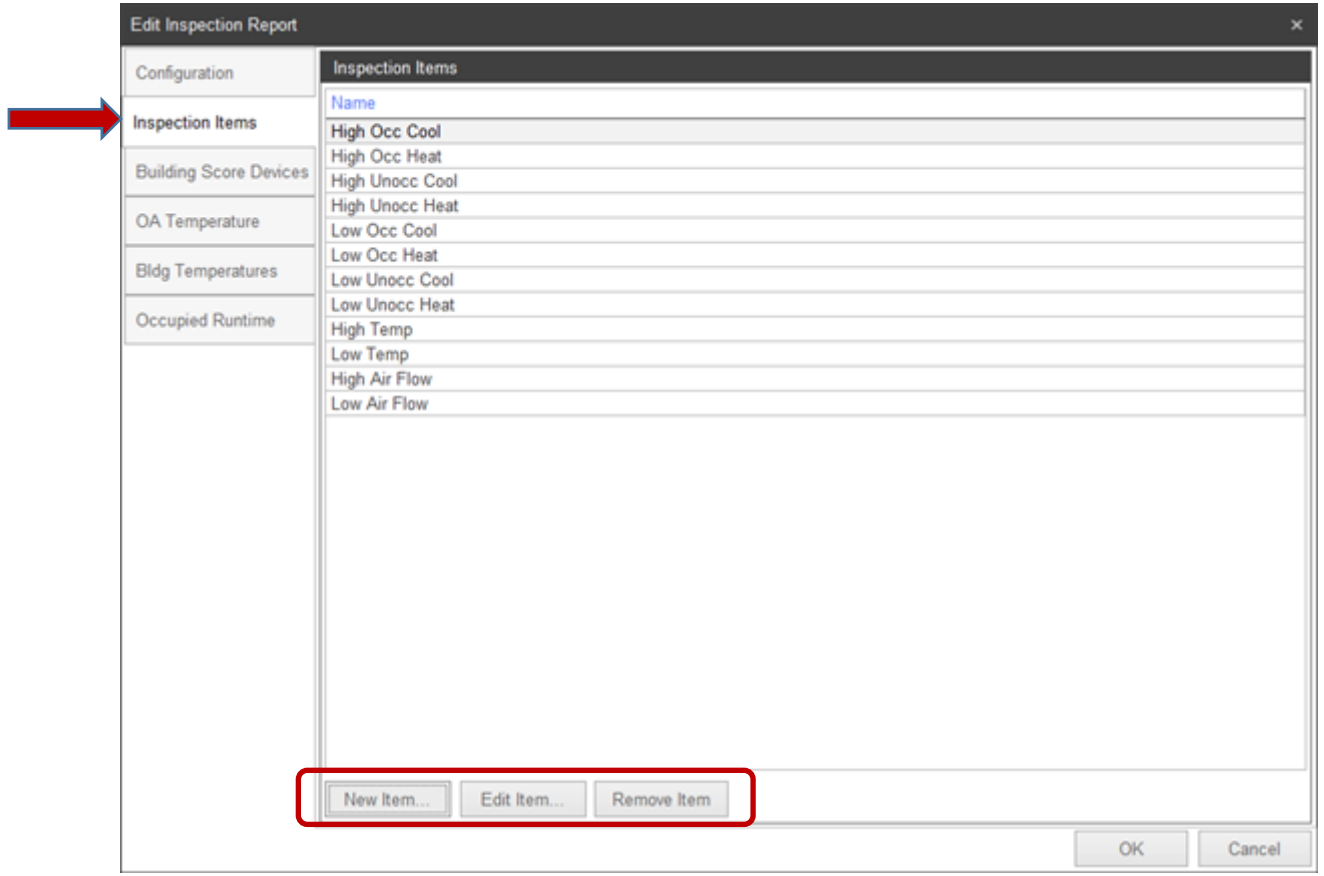
Inspection Items

The list of provided inspection item Rules will display.

You may also create new custom rules or add additional templated rules from other profiles by clicking *New Item.*

You may Remove any Rule by clicking *Remove Item.*

You may Edit any Rule by clicking *Edit Item.*



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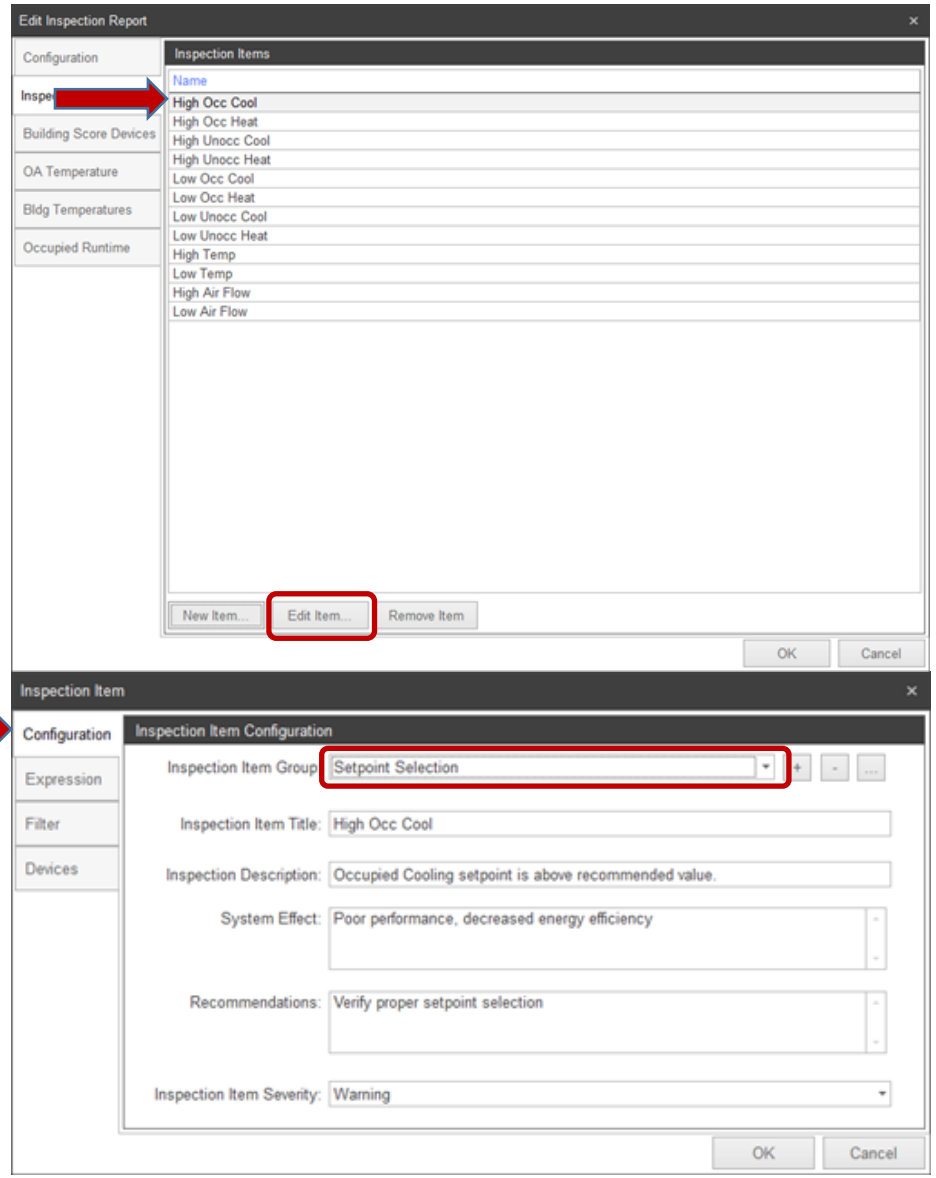
Inspection Report using Templates

Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Editing Inspection Items

Select an item and click on *Edit Item…*



Configuration Tab

The Configuration tab window opens.
This section defines where in the report the text pertaining to this Inspection item will display.
The Inspection Item Group line displays the selected Inspection item group.

A dropdown arrow is provided to move this Inspection Item's text in the report into the text space of one of the other provided Inspection Item Groups.

KEY2ACT

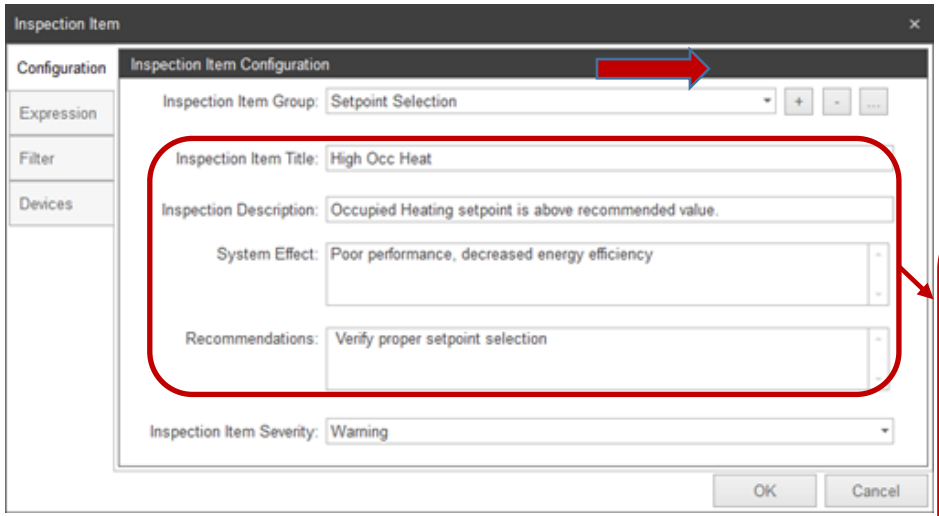
Inspection Report using Templates

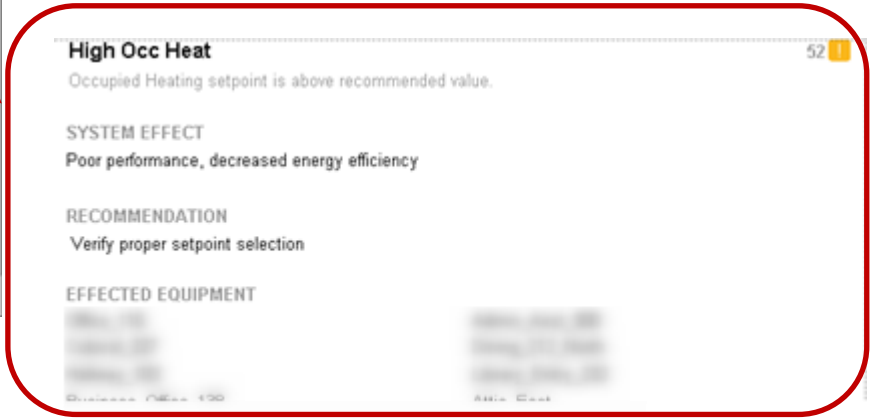
Templates will provide access to templated creation of Inspection Items in Inspection Reports.

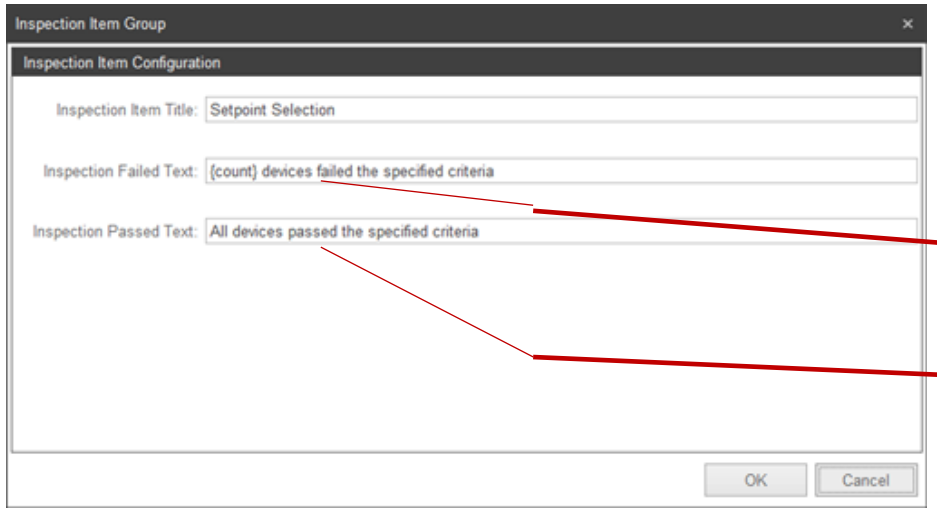
Editing Inspection Items Configuration Tab

The text entered in these boxes will present in the completed report

This value will display the sum of all setpoint selection rule failures from all devices. Note that multiple setpoint rules may apply to each device.







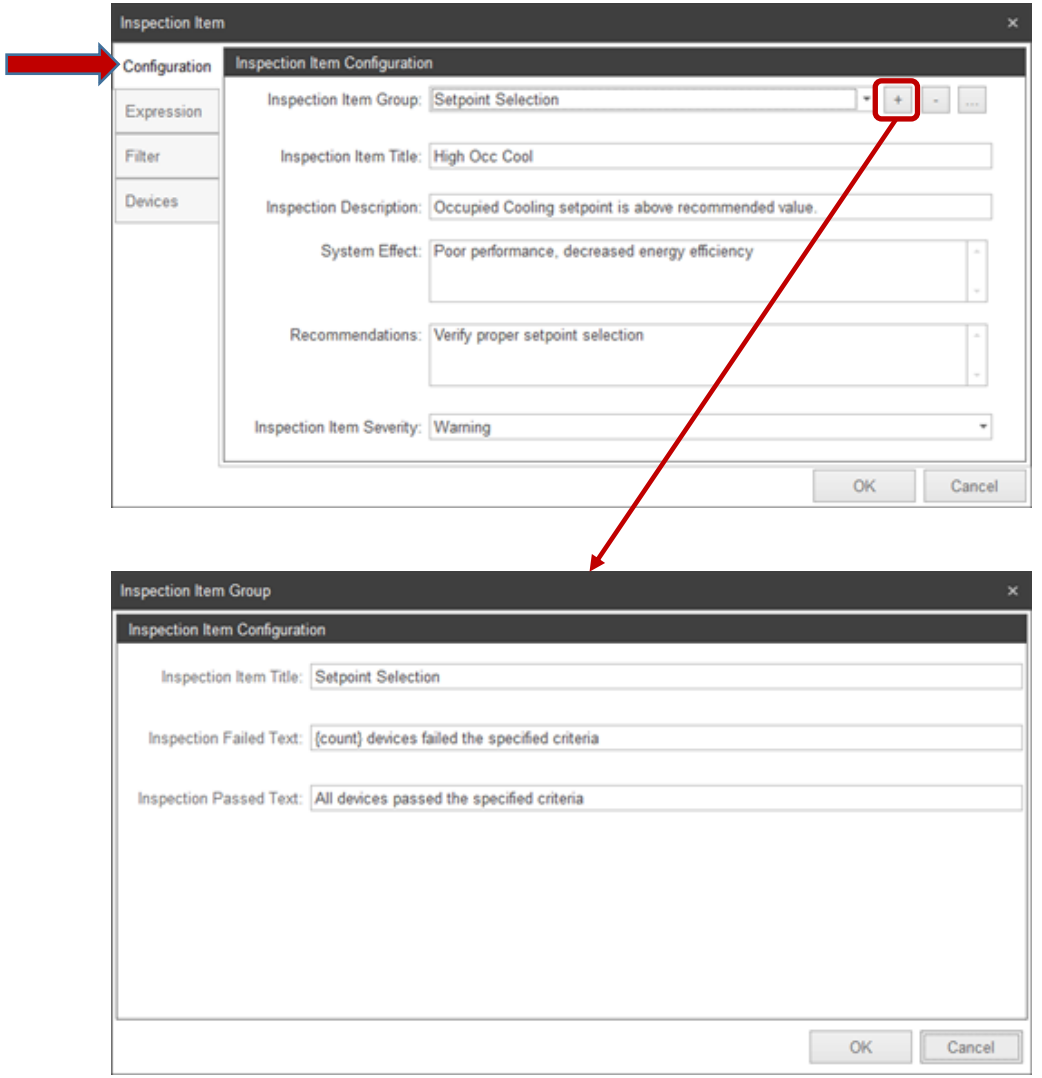
KEY2ACT

Inspection Report using Templates

Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Editing Inspection Items
Configuration Tab

The + button provides the user with a method to create a new Inspection Item Group and define the text that will be displayed in the report.



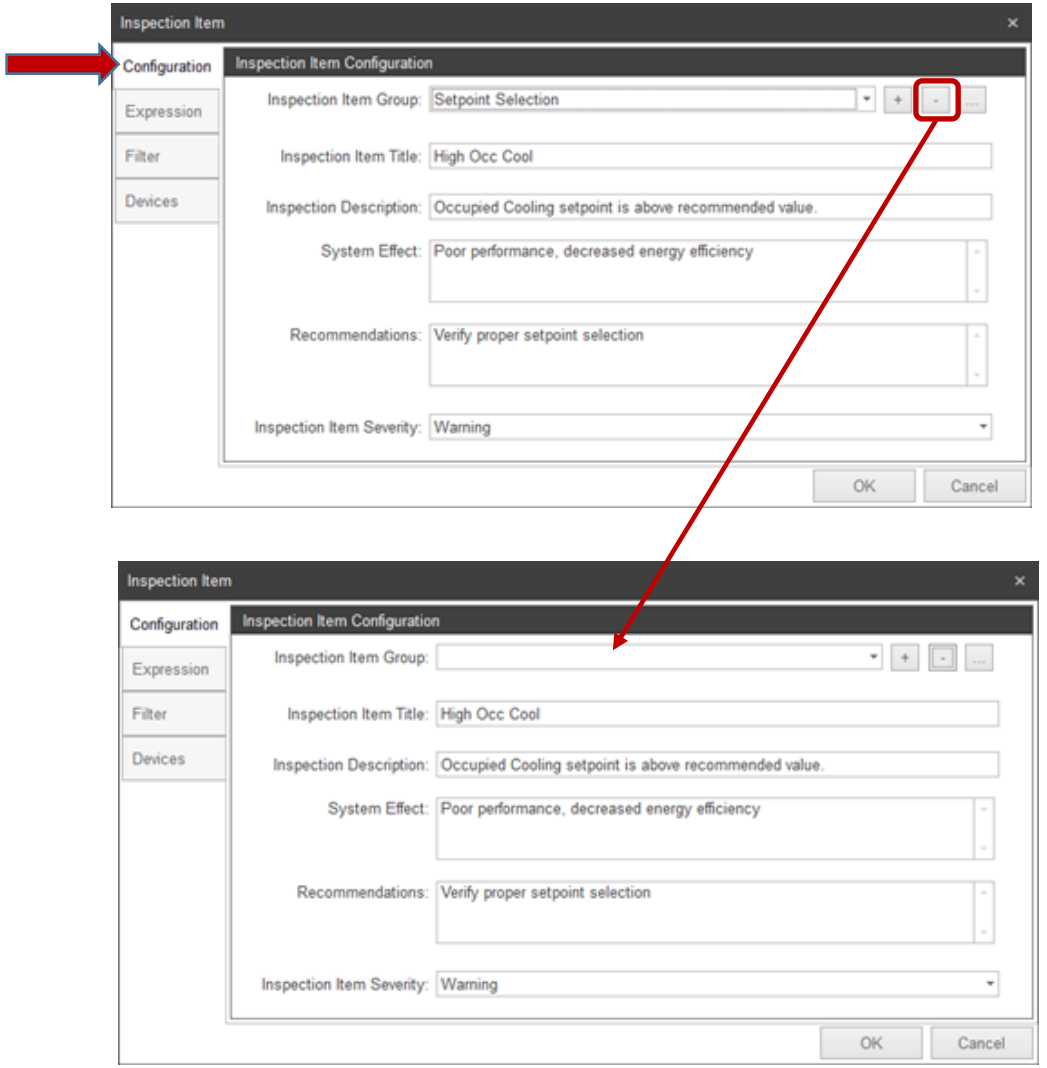
KEY2ACT

Inspection Report using Templates

Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Editing Inspection Items
Configuration Tab

The - button provides the user with a method to remove the selected Inspection Item Group from the list of available Inspection Item Groups.



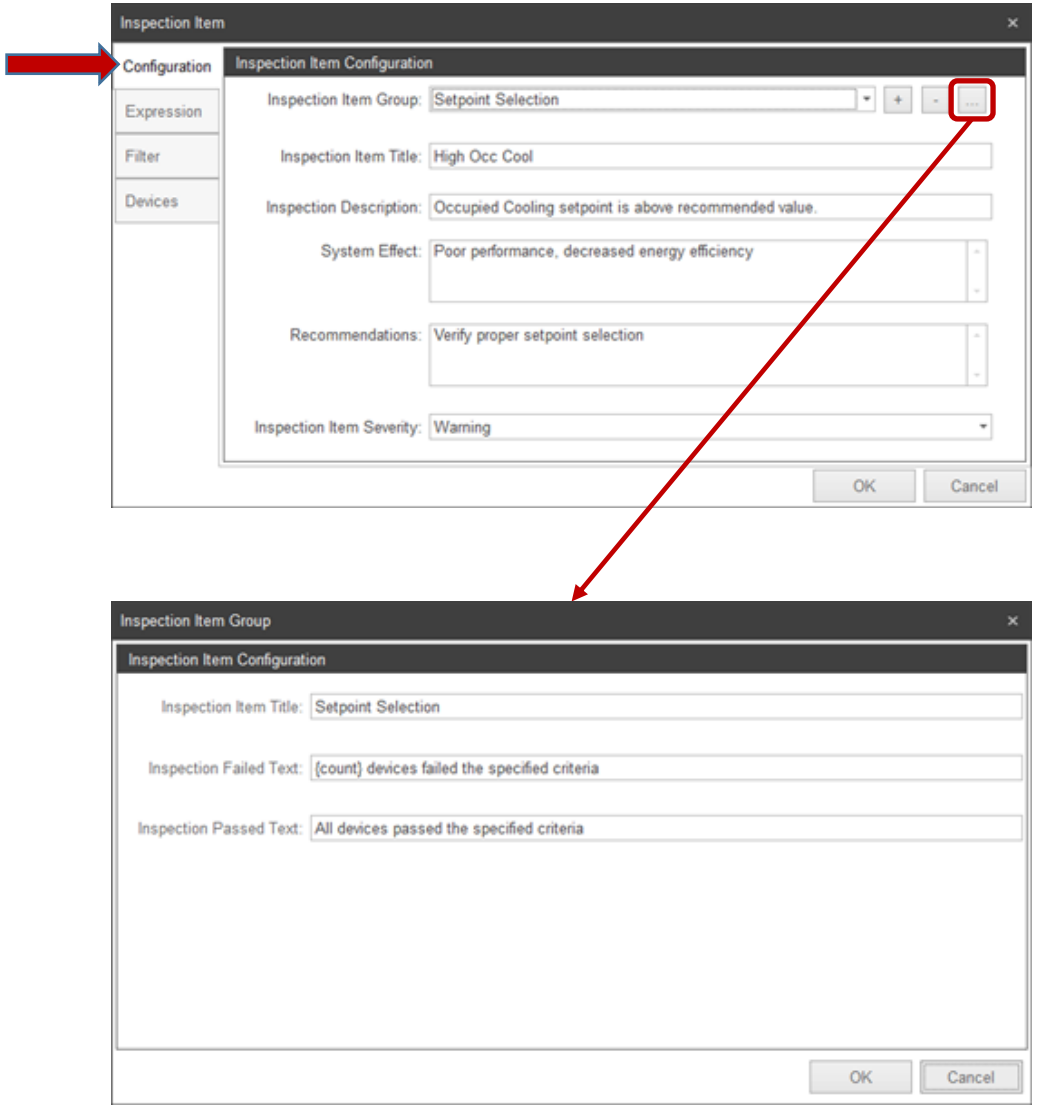
KEY2ACT

Inspection Report using Templates

Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Editing Inspection Items
Configuration Tab

The … button provides the user with a method to edit the selected Inspection Item Group title as well as the text that will be displayed in the report.



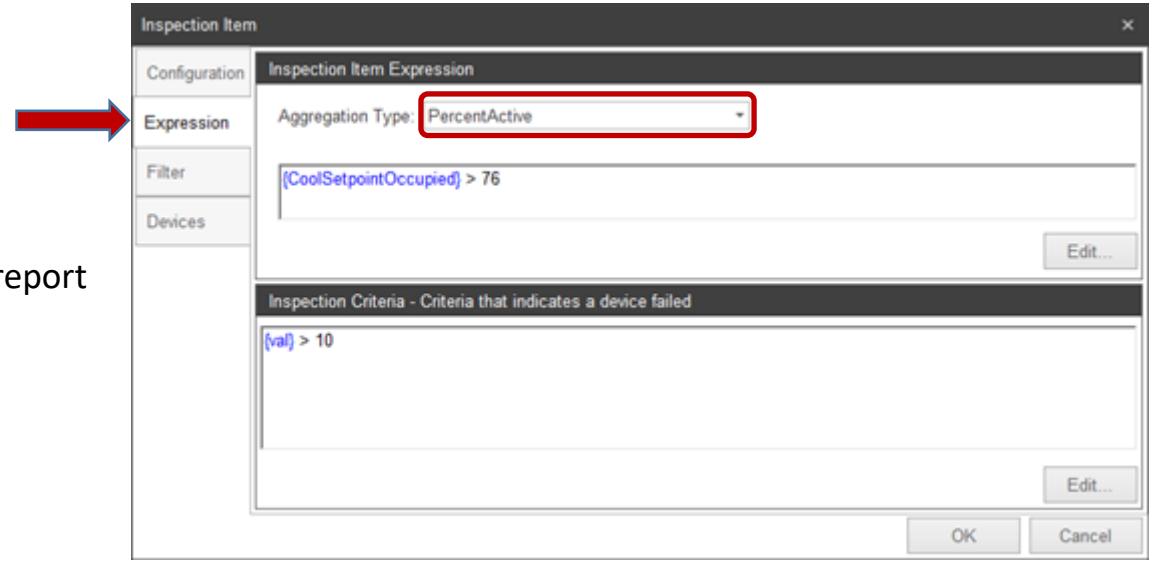
KEY2ACT

Inspection Report using Templates

Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Editing Inspection Items

Configuration Tab



The Expression tab provides a tool set to define the criteria that expresses a failed condition.

This example can be described as;
When the CoolSetpointOccupied is greater than 76 more than 10% of the Inspection report DateRange. Default is One month.

Available aggregation types are;
Note that First through Delta aggregations return a Numeric result.
First = The first collected value in the DateRange aggregation.
Last = The last collected value in the DateRange aggregation.
Sum = The sum of all collected values in the DateRange aggregation.
Avg = The average of all collected values in the DateRange aggregation.
Min = The minimum of all collected values in the DateRange aggregation.
Max = The maximum of all collected values in the DateRange aggregation.
Delta = The last sample minus the first sample in the Aggregation Window.
Note that to achieve a true delta, the user must apply the Absolute operator to the criteria. Example “ABS{val}”
OccurenceCount = The sum of occurrences where the expression result value is true in the Aggregation Window.
ChangeCount = The sum of occurrences where the expression result value changed in the Aggregation Window.
PercentActive = The percentage of occurrences where the expression result is true in the Aggregation Window.
TotalDuration = The total duration of time in minutes where the expression result is true in the Aggregation Window.

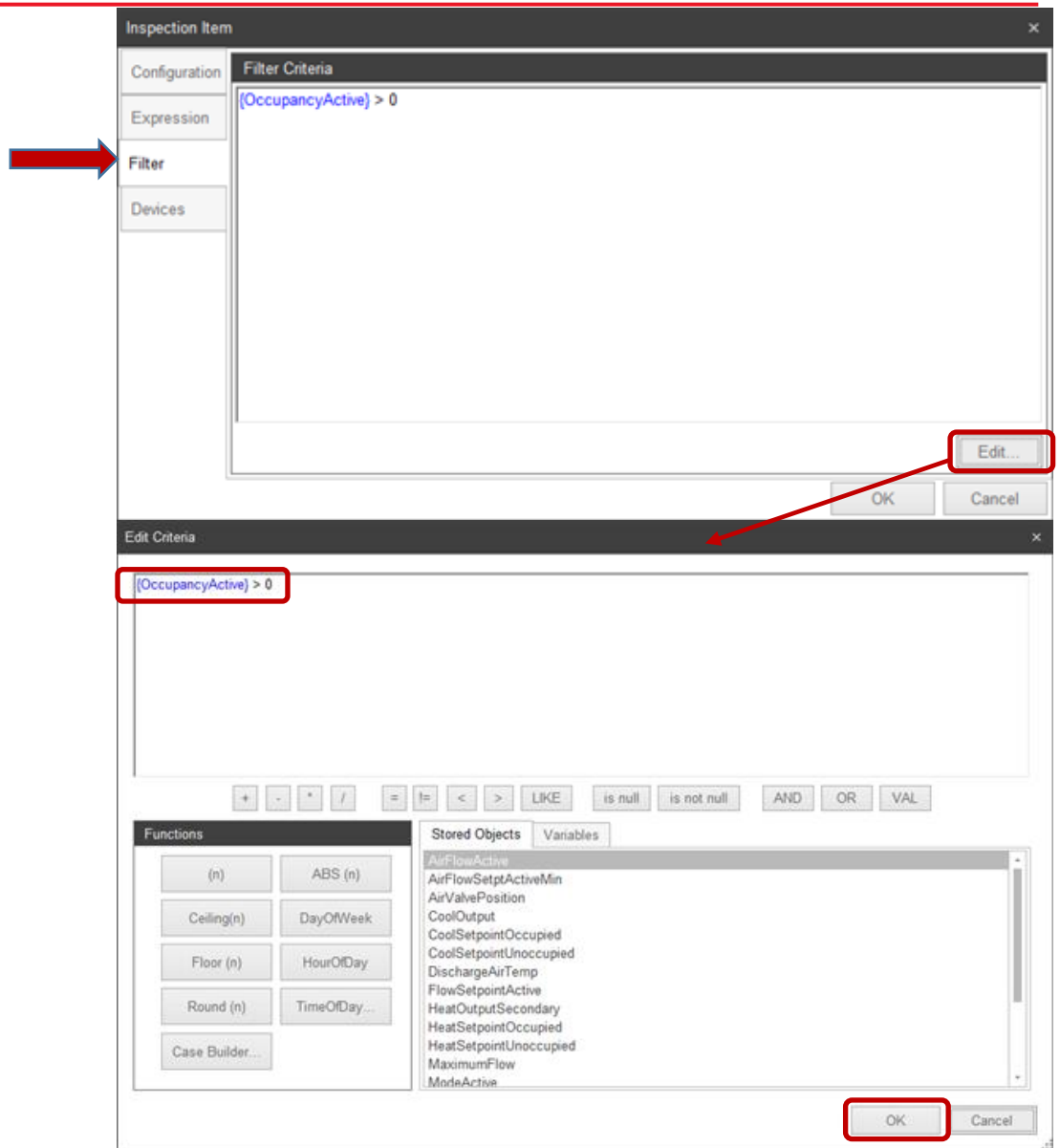
KEY2ACT

Inspection Report using Templates

Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Editing Inspection Items
Filter Tab

The Filter Criteria tab opens the Filter Criteria window.



Click *Edit* to edit or create a filter.

The Edit Criteria window opens where you select the criteria that defines when the Expression will be applied.

Click *Ok.*

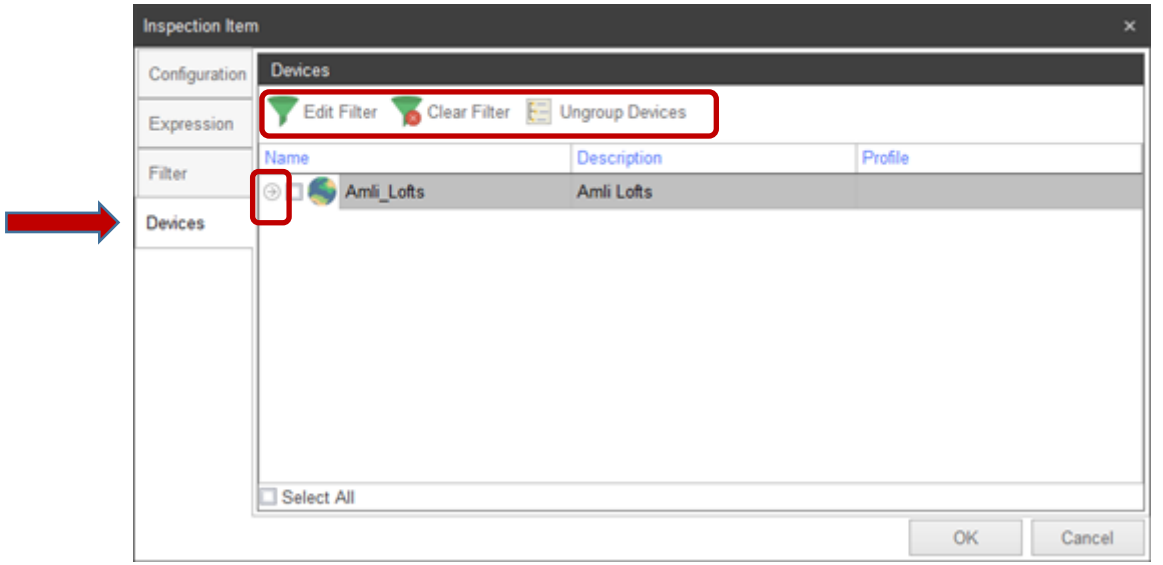
KEY2ACT

Inspection Report using Templates

Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Editing Inspection Items
Devices Tab

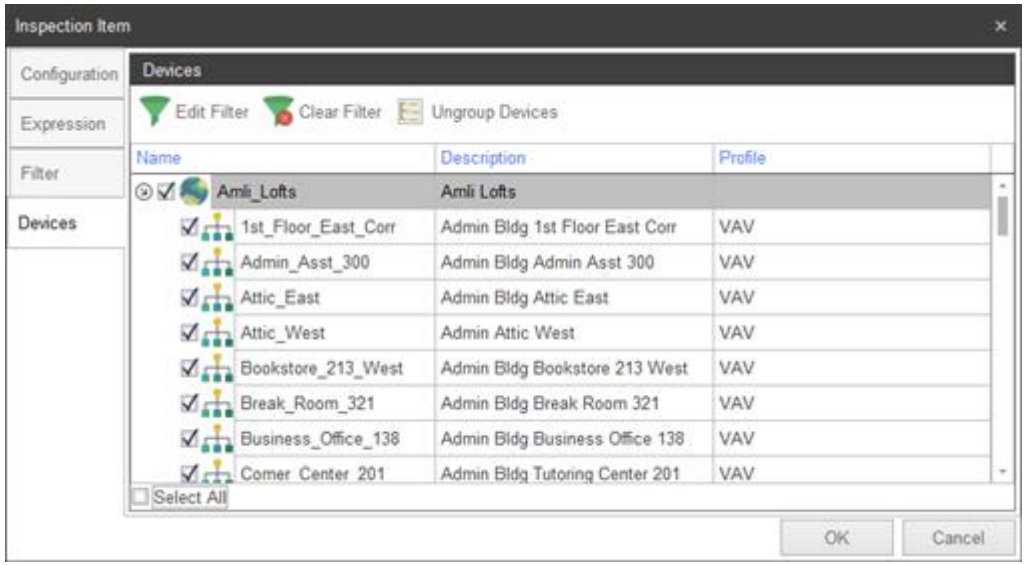
The Devices tab opens Devices window.
Note the Filtering tools.
If Inspection Item Rules were drawn from more than one profile or a profile exists in more than one agent. The list of devices may be large.
The Filtering tools are based on tags applied to agents and devices.



The Ungroup Devices tool will remove the agent hierarchy and list only the devices.

Select the dropdown to the left of the Agent name to expose the list of devices.

Select the checkbox to the left of the Agent name to select all devices under the Agent.
Select individual devices as desired.



Click *OK.*

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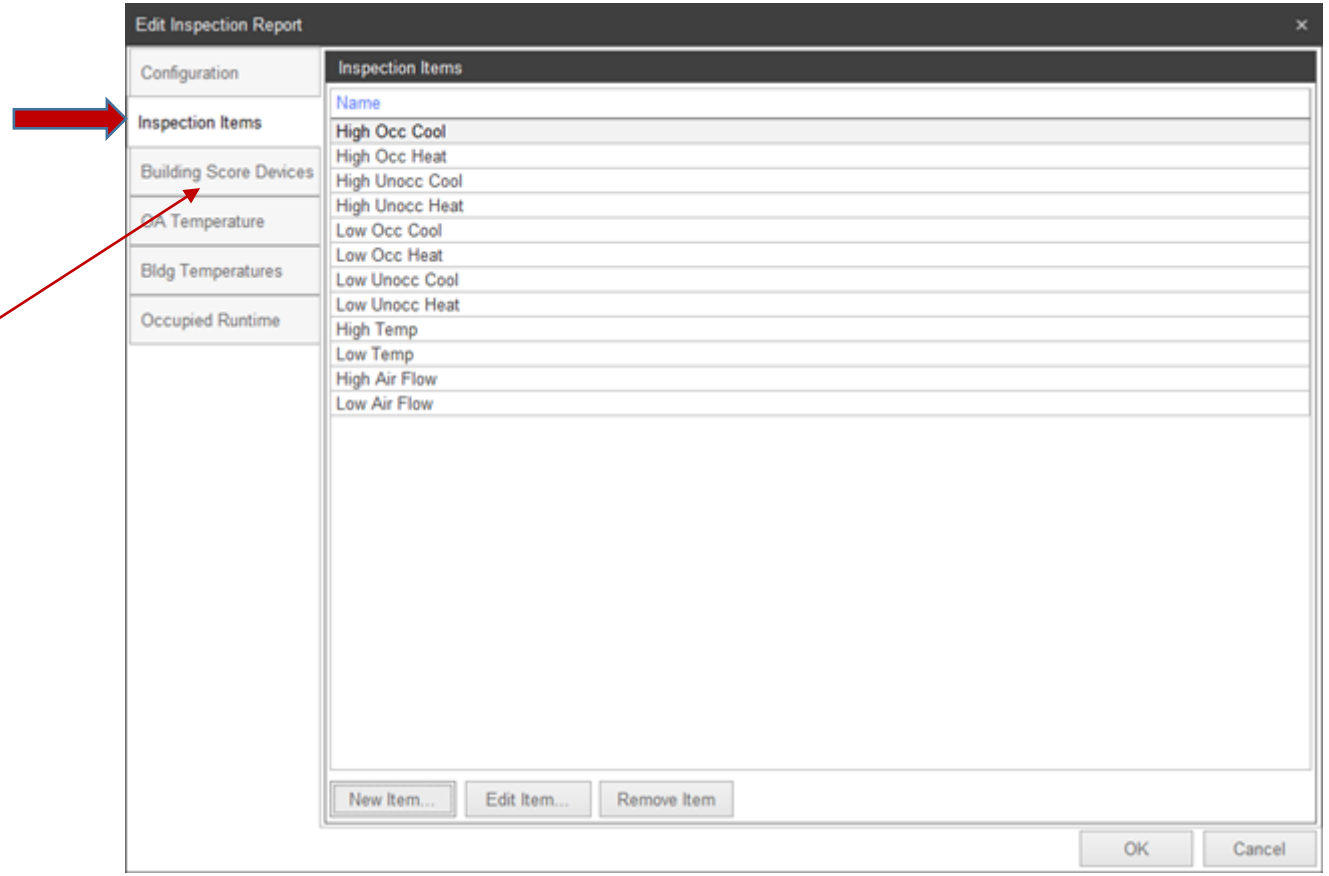
Inspection Report using Templates

Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Inspection Items



Do not click *Ok* at this time.

Click on the *Building Score Devices* tab.

KEY2ACT

Inspection Report using Templates

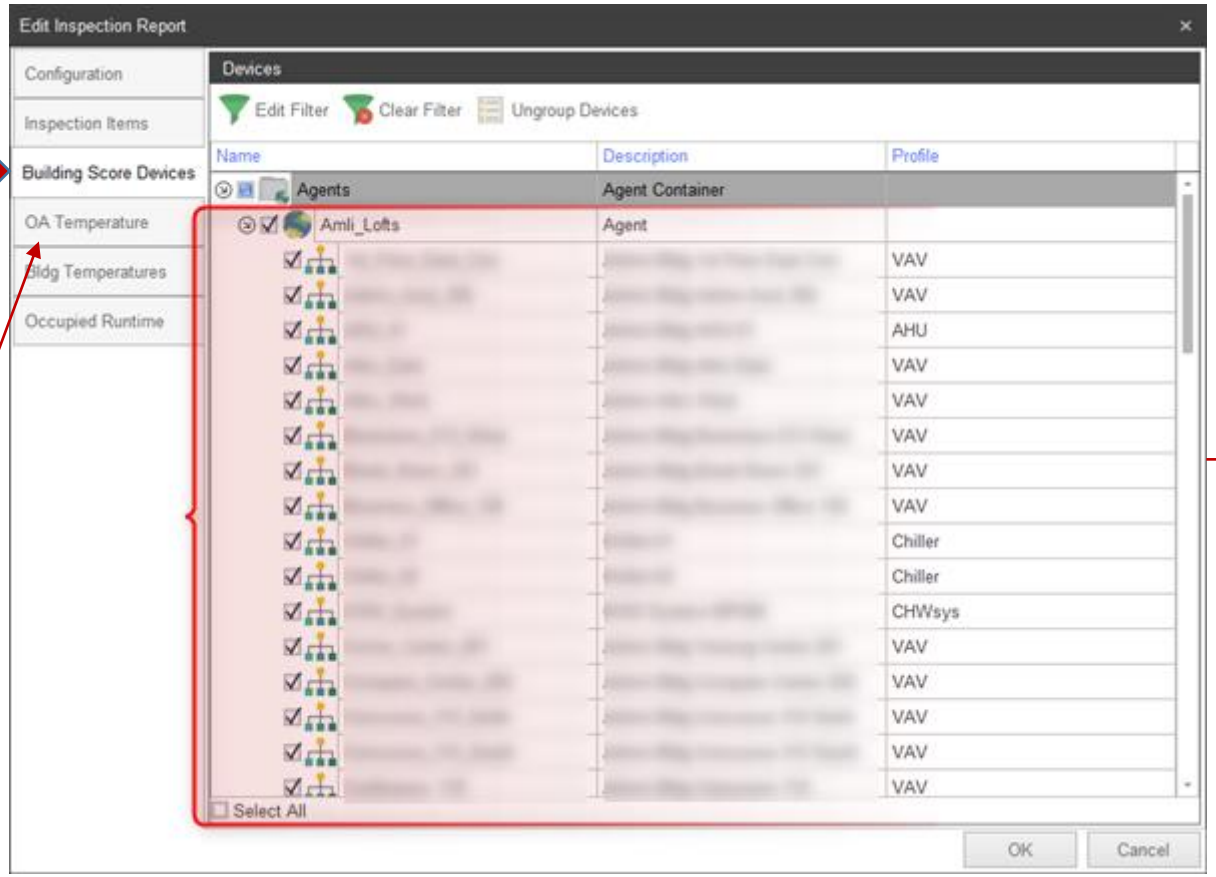
Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Building Score Devices

Select the devices whose watchdog scores you wish to be included in the Building Average Score. Selecting the Agent will include all devices under the Agent.

Do not click *Ok* at this time.

Click on the *OA Temperature* tab.



KEY2ACT

Inspection Report using Templates

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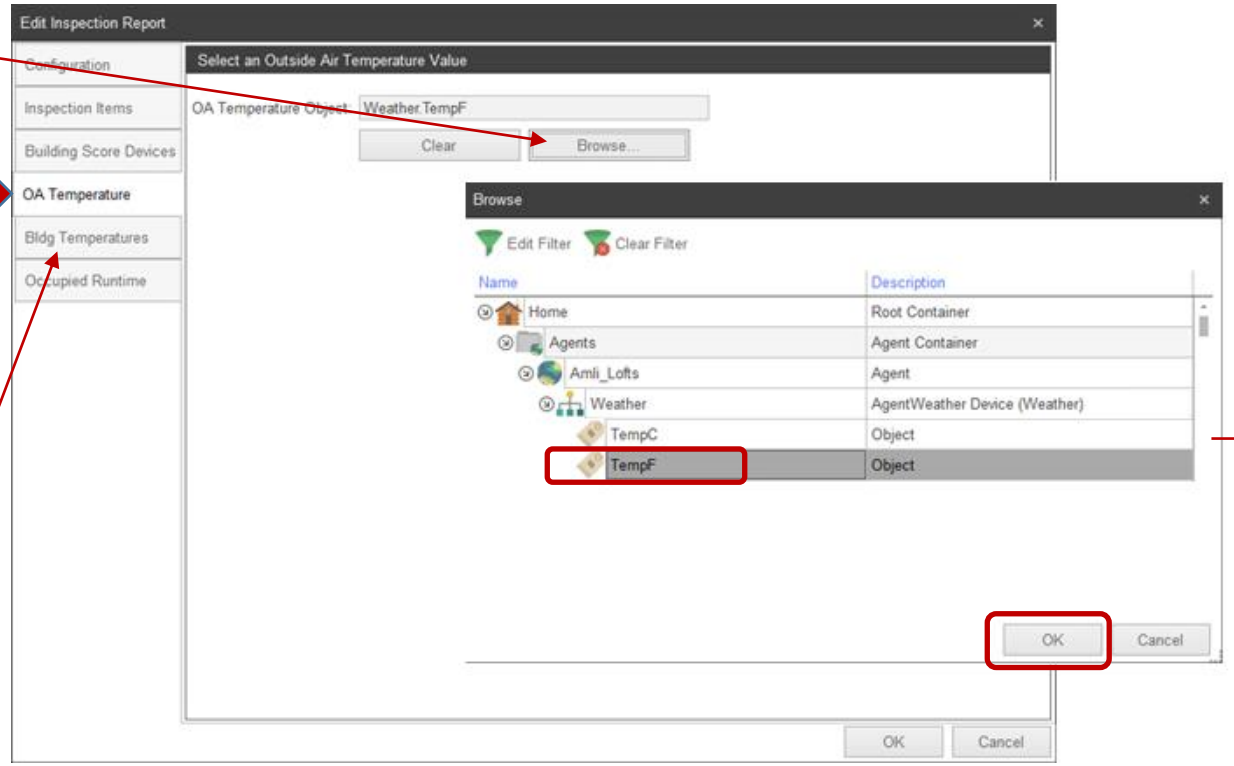
OA Temperature

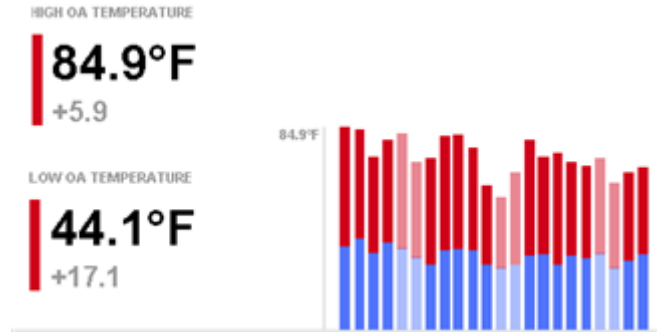
Click on *Browse*.

The Browse window opens. Navigate to a device that contains an outside air temperature value. Select it and click *OK* inside the Browse window.

Do not click *Ok* at this time.

Click on the *Bldg Temperatures* tab.





KEY2ACT

Inspection Report using Templates

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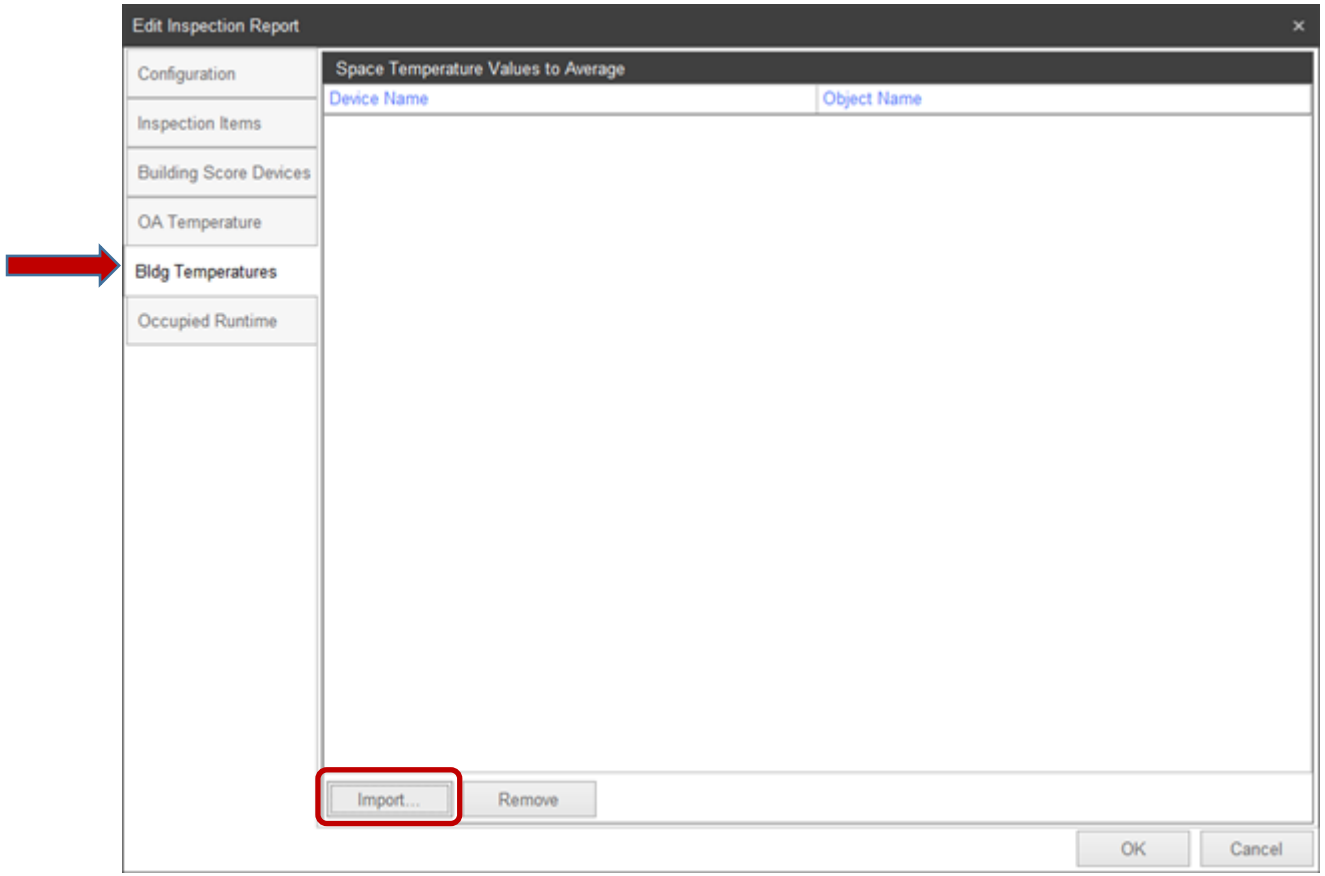
Bldg Temperatures



Click on *Import*.

KEY2ACT

Inspection Report using Templates

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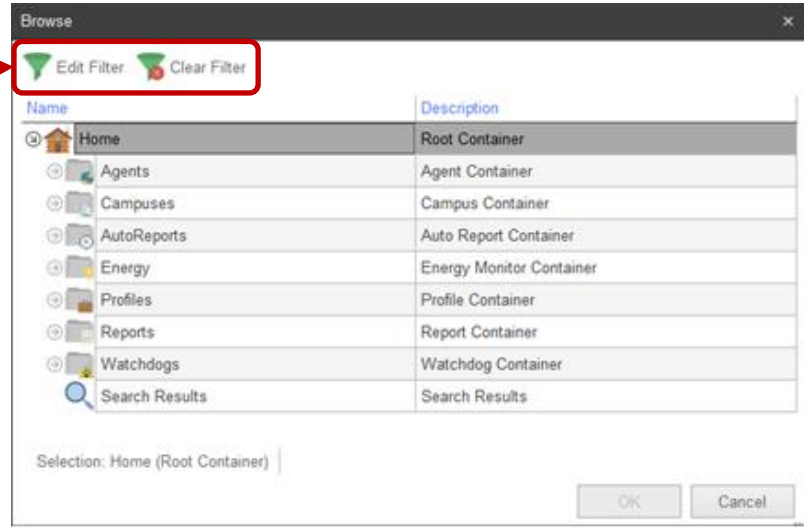
Bldg Temperatures

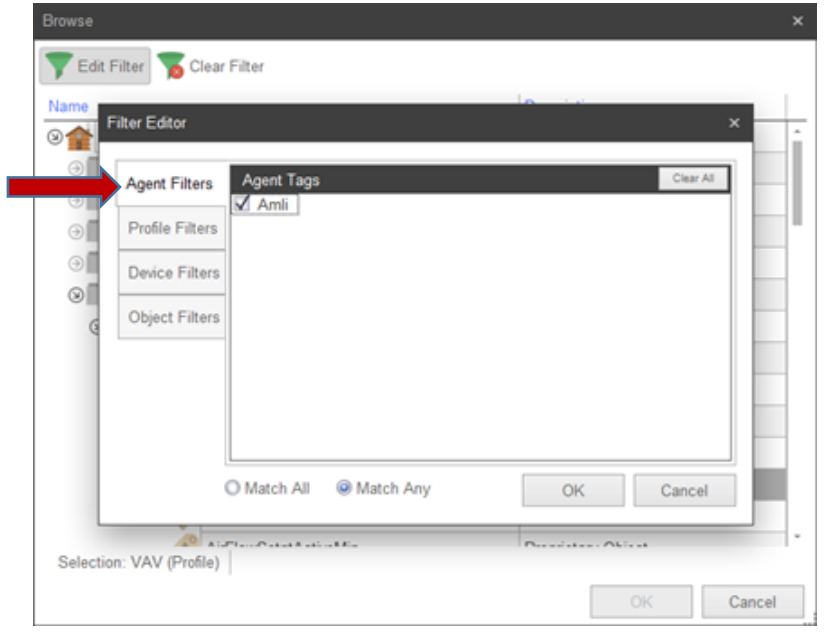
The Browse window opens.
Note the Edit Filter and Clear Filter tools.



If a tag has been applied to an Agent, Profile, Device or Object. The Filter Tool will return results filtered down to items containing the selected tags.

Tags are applied to Agents, Profiles, Devices or Objects in the Configuration Explorer window.

Otherwise the returned list will be drawn from any item in the database “all agents” that contain that same name.



Choose the desired Filter type and tag.

Click *OK*

KEY2ACT

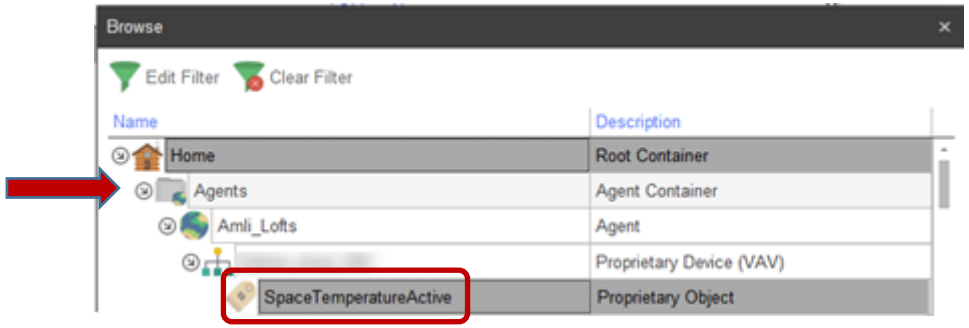
Inspection Report using Templates

Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Bldg Temperatures

Choosing a single or small group of space temperatures;

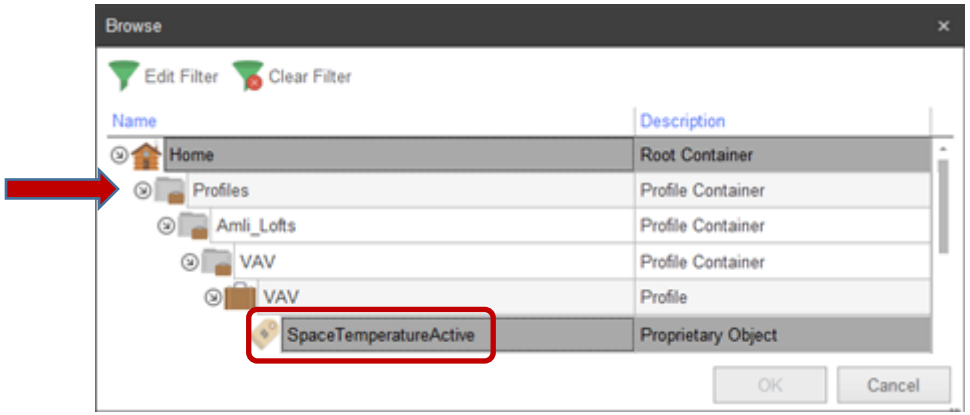
Explore and choose the desired single space temperature object from a single device and click *OK.*
If you choose this method you may continue to add additional single space temperature from other devices to the list. You may also repeat this process to add a selected group of space temperature objects.



OR

Choosing a profile group of space temperatures;

Choose the desired object from a profile and click *OK*.
If you choose this method the provided group of objects will be drawn from the profile selected.
Note that if your database of agents contains other objects with the same object name, all of those objects will also be included. Use the filtering tool to limit the list of returned space temperature objects to one agent.



KEY2ACT

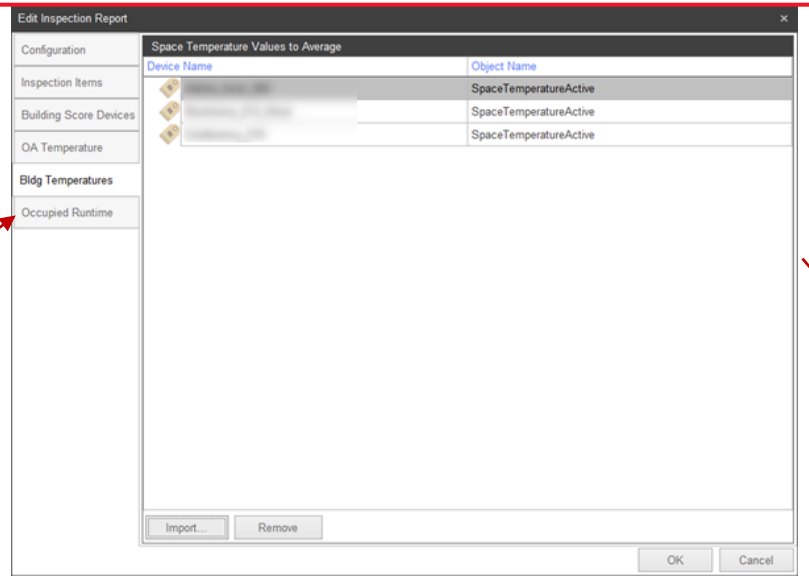
Inspection Report using Templates

Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Bldg Temperatures

A single or small group of space temperatures.

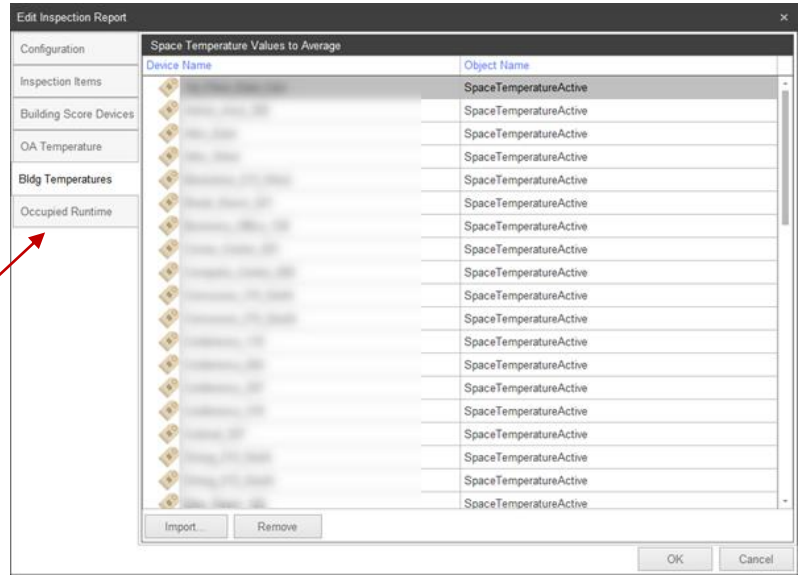
Do not click *Ok* at this time.
Click on the *Occupied Runtime* tab.

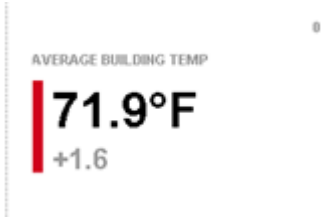


OR

A profile group of space temperatures.
Verify that this group of space temperature objects are members of the correct agent. If not, then remove the objects that do not reside in this agent.

Do not click *Ok* at this time.
Click on the *Occupied Runtime* tab.





KEY2ACT

Inspection Report using Templates

Templates will provide access to templated creation of Inspection Items in Inspection Reports.

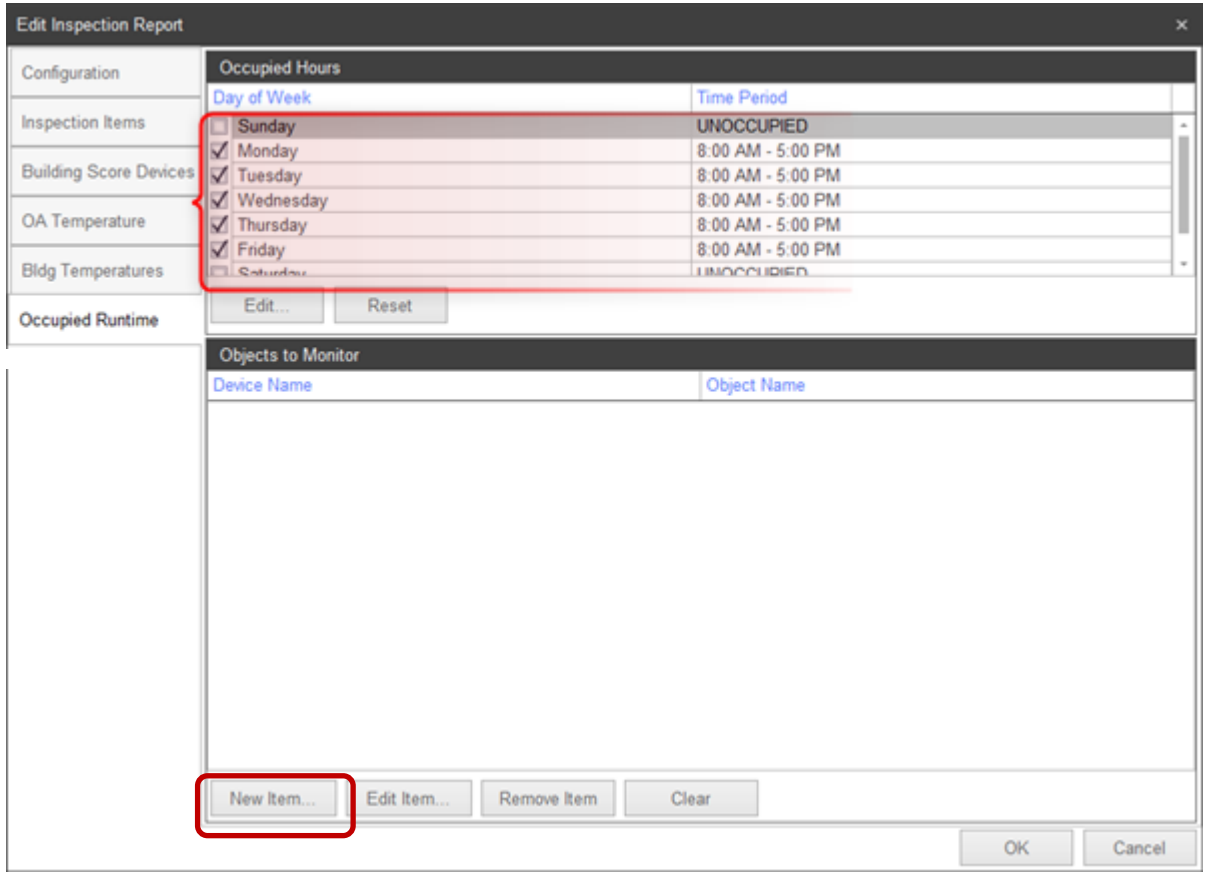
Occupied Runtime

Occupied Hours

The upper pane defines the days and hours that will be considered Normal runtimes. Any operation of objects selected in the Objects to Monitor pane will be compared to these hours. Any operation outside these times will be considered as Unoccupied Operation.

Objects to Monitor

Select *New Item.*



KEY2ACT

Inspection Report using Templates

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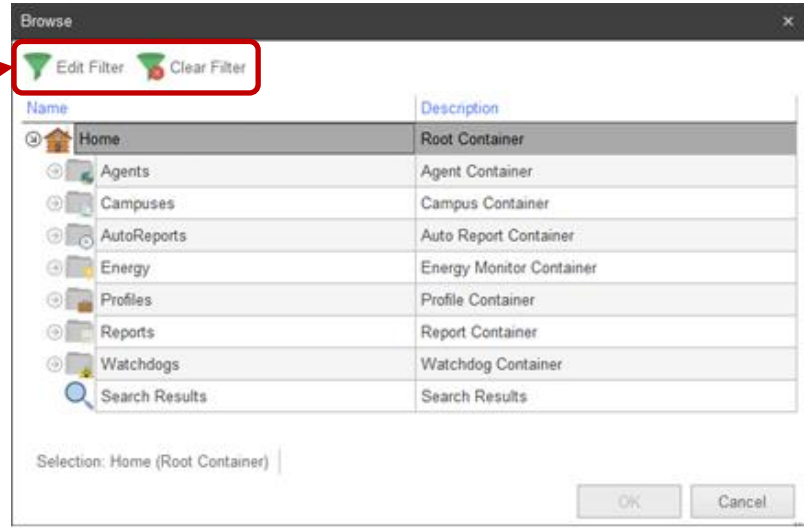
Occupied Runtime

Objects to Monitor

The Browse window opens.
Note the Edit Filter and Clear Filter tools.

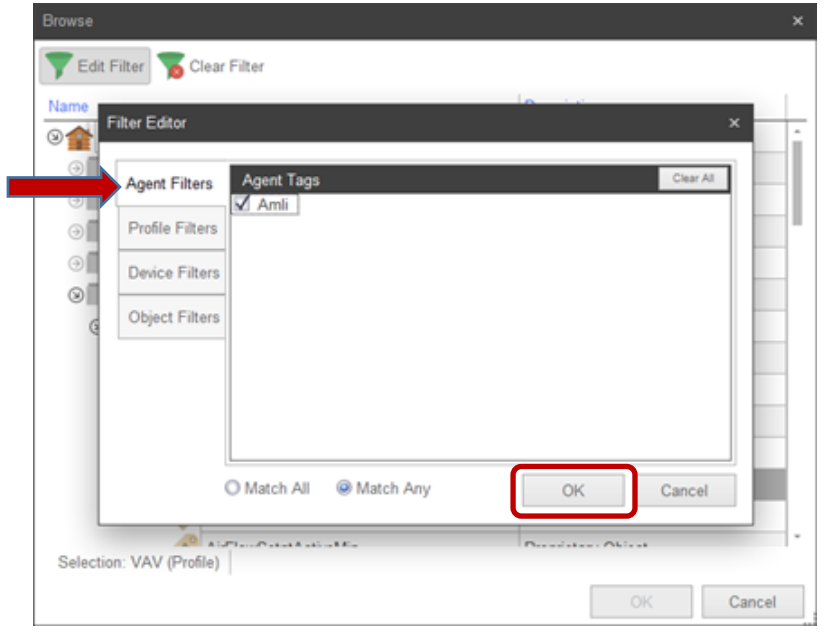


If a tag has been applied to an Agent, Profile, Device or Object. The Filter Tool will return results filtered down to items containing the selected tags.

Tags are applied to Agents, Profiles, Devices or Objects in the Configuration Explorer window.

Otherwise the returned list will be drawn from any item in the database “all agents” that contain that same name.

Choose the desired Filter type and tag.



Click *OK*

KEY2ACT

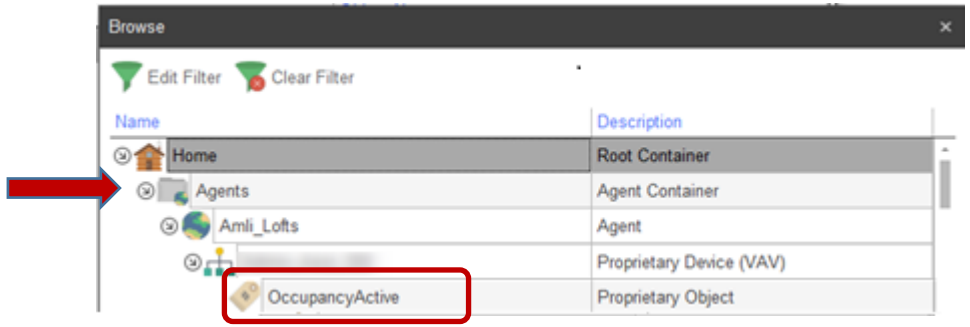
Inspection Report using Templates

Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Occupied Runtime

Objects to Monitor
Choose a single occupancy reference;

Explore and choose the desired single occupancy reference object from a single device and click *OK*.



KEY2ACT

Inspection Report using Templates

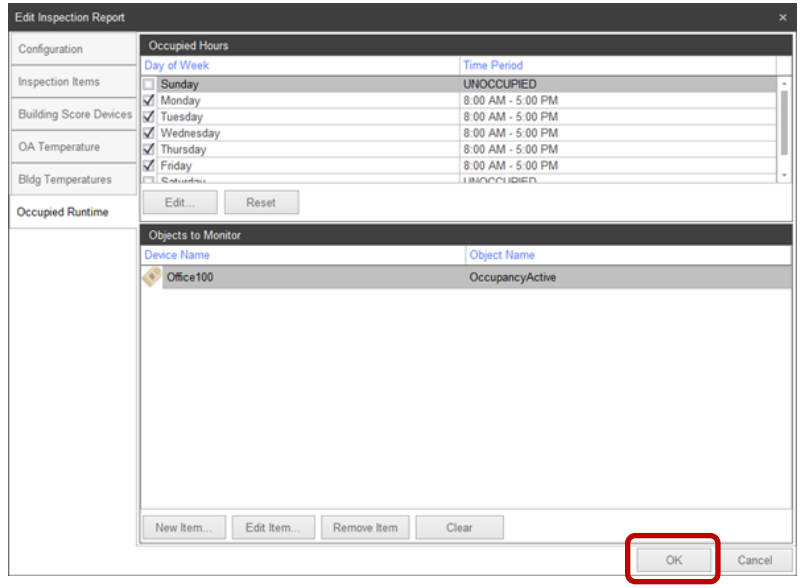
Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Occupied Runtime

Objects to Monitor

A single occupancy reference.

Now you may click *Ok*



KEY2ACT

Inspection Report using Templates

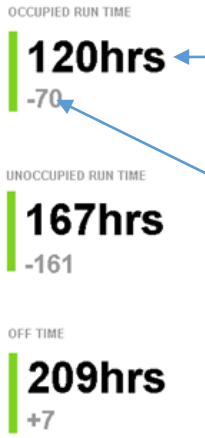
Templates will provide access to templated creation of Inspection Items in Inspection Reports.

Occupied Runtime

Building Metrics Occupancy Page

If no Occupancy Objects are selected. The report will not include a Building Metrics Occupancy page.

The DateRange uses the current month by default.



Sum of Occupied hours so far the current DateRange.

Change in the sum of Occupied hours compared the previous DateRange .

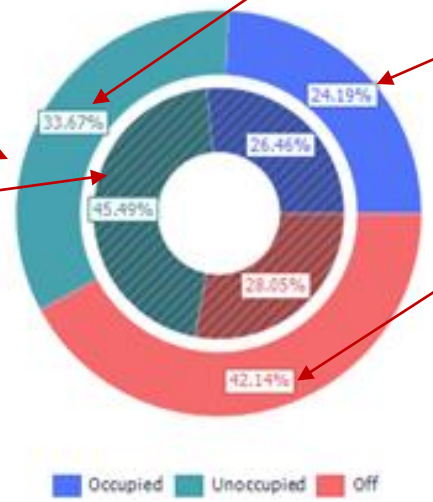
Percentage of the sum of all hours where the monitored object was operating during the defined Unoccupied time range.

Percentage of the sum of all hours where the monitored object was operating during the defined Occupied time range.

Percentage of the sum of all hours where the monitored object was Off during the defined Unoccupied time range.

The outer circle depicts the current DateRange values.

The inner circle depicts the previous DateRange values.



KEY2ACT

THANK YOU