

Preview and Modules (PA)

You can preview content in the project as you edit. This lets you both test the project and quickly return to the design environment to make changes.

When you preview content, you can do the following:

- Do available actions on data nodes, such as setting values.
 - Use the Layer Selection widget, Date Range Selection widget, and DVR widget to control the displayed data.
 - Hover over objects in pages and templates to see information about the binding source.
 - Create, view, edit, save, and delete reports.
 - View, filter, acknowledge (ack), and annotate alarms in the data source.
 - View, create, edit, and delete schedule events in the data source.
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How to Begin Previewing Content

There are three ways to preview content.

How to Use the Preview Tool in the Editor

To toggle Preview mode on or off in the Page Editor or Template Editor:

- In the toolbar, click the  **Preview** tool.

How to Preview All Pages and Panels via the Dashboard Manager

To preview all pages and panels in the Dashboard Manager:

- In the Dashboard Manager, choose a node in the project tree.

When you use this method, you can't see the project header or the final navigation menu.

How to Preview a Project

To preview the entire project, do one of the following.

- Click **Preview** on the home page, as shown in the following image.



- Choose the **Preview Project** tab at the top of the screen, as shown in the following image.



When you use this method, you can access all functionality in the project.

How to Do Data Actions

You can click objects to do invoke actions. To interact with data:

1. Click the object.

A menu displays the available data actions for the bound metric, as shown in the following image.



2. Use the menu to do data actions.
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How to Change Data Displays

You can use the Layer Selection widget, Date Range Selection widget, and DVR widget to control the data that is displayed.

How to Change the Global Layer Selection

The Layer Selection widget sets the global layer selection.

See also: [Widget: Layer Selection](#), [Layers](#).

To use the Layer Selection widget:

- Click the arrows to choose the next or previous layer.
- Use the drop-down menu to select a layer.

How to Change the Global Date Range

The Date Range Selection widget sets the global date range.

See also: [Widget: Date Range Selection](#), [Global Date Range](#).

To use the Date Range Selection widget:

- Click the arrows to choose the next or previous date range.
- Click the date range, and then select a new date range.

This sets the date range for the project.

How to Play Back Data

The DVR widget can play through historical data in the global date range. This widget affects zones, callouts, and charts for which the **Show Current Value** property is set as TRUE (real-time charts).

See also: [Widget: DVR](#), [Global Date Range](#).

To use the DVR widget:

1. Set the **Realtime/Playback** toggle to Playback.
2. Either click the **Play** button, or click and drag the slider to “scrub” through the date range.



Tip

To change the date range in the DVR widget, use a Date Range Selection widget.

How to Use the Reports Module

The Reports module lets you quickly build, save, view, delete, and edit data reports.

You can use all functions of the Reports module in the following contexts:

- While you preview a project. See [How to Begin Previewing Content](#).
- In a launched project. See [Launch](#).

Reports Module Permissions

Reports can be Global or non-Global. You determine whether a report is Global when you save a report or edit report settings. On the landing page, Global reports appear in **Global Reports**, and non-Global reports appear in **My Reports**. If the current user created a Global report, it has a blue icon. If someone

else created it, it has a gray icon. A non-Global report can be seen only by the user who created it.

Anyone who can access the Reports module can:

- Create a new report.
- View and edit any Global report.
- Use the **Save** or **Save As** command to save reports that this user created.
- Use the **Save As** command to save a new version of a Global report.
- Delete reports that this user created.

Only the creator of a Global report can:

- Use the **Save** command to update this report.
- Delete this report.

Reports Module Date Ranges

The Reports module does not use the project's global date range. Instead, the Reports module has its own date range that applies to all reports. You can set a date range for an individual report that overrides the global reports date range, using an object's **Custom Range** Property. See [Object Properties](#).

A report with an *absolute* date range, such as June 2017, will display the same data no matter when it is opened. To choose an absolute date range, use one of the following:

- Choose the **Day** or **Week** button and use the calendar.
- Choose the **Month** or **Year** button and use the drop-down menus.

A report with a *relative* date range, such as This Week, will display data that depends on when it is viewed. To select a relative date range, use one of the following:

- Choose the **Relative** button and use the drop-down menus and number field.
- Choose the **Day**, **Week**, **Month**, or **Year** button and use one of the following buttons: **Today**, **Yesterday**, **This Week**, **Last Week**, **This Year**, or **Last Year**.

How to Create a Report

To create a new report, add widgets to it, and save the report:

1. On the Reports module landing page, click **Create a New Report**, as shown in the following image.



2. Click the **Layout** icon in the top right corner. Then, select a configuration for your report, as shown in the following image, and click **Apply**.



3. Drag an object from the bottom of the page to one of the specified areas, as shown in the following image.



4. Drag and drop a node from the Data tree onto the widget to create a binding, as shown in the following image.



With chart, gauge, and Node List objects, you can bind more than one node to create multiple series.

5. Edit the object's properties and bindings. See [How to Edit Object Properties](#), [Object Properties](#), and [Bindings](#).



Note

In reports, unlike pages and templates, you can use only data nodes as binding sources. You can't use Project Tree nodes or relativized points.

6. To add more widgets, repeat steps 3-5.

How to Change the Report Layout

You can change the layout configuration of a report. Widgets will retain their layout order. If you change to a layout that has fewer objects than the previous layout, some objects will not be included.

To change report layout:

1. Click the **Layout** icon in the top right corner.
2. Select a configuration for your report, and click **Apply**.

The following image demonstrates how to change the report layout.



How to Change the Reports Date Range


To change the date range for the Reports module, click the date range at the top of the Reports module page or panel, and select a new range, as shown in the following image.



To override the Reports module date range for an object, use the object's **Custom Range** Property. See [Object Properties](#).

How to Delete an Object from a Report

To delete an object from a report:

Click the  **Delete** icon in the object's header.

How to Save a Report

To save a report that you are editing:

1. Click **Save As** or **Save**, as shown in the following image.



If this is your first time saving the report, or if it is a Global report created by a different user, **Save As** is the only option.

2. Name the report, as shown in the following image.



3. If you want, add a description.
4. Specify whether this is a Global report. See [Reports Module Permissions](#).

How to View a Report

If you created a report, it has a blue icon. If someone else created it, it has a gray icon.

The following interactions open a report for viewing:

- From the landing page, click the report, as shown in the following image.



- From the landing page, right-click the report, and select **View Report**, as shown in the following image.



How to Edit a Report

There are two ways to start editing a report that has already been created.

See also: [How to Create a Report](#).

How to Start Editing a Report from the Landing Page

This option is available only for reports that you created.

To edit a report via the landing page:

- Right-click the report, and choose **Edit Report**, as shown in the following image.



How to Start Editing a Report from Viewing a Report

This option is available for all reports.

To start editing a report that you are currently viewing:

- Click the **Edit** button in the top left corner, as shown in the following image.



How to Edit Report Settings

To edit the report name, report description, or whether the report is Global:

- From the landing page, right-click the report, and choose **Properties**, as shown in the following image.



How to Return to the Landing Page

To return to the landing page from a report:

- Click Back or Home, as shown in the following image.



How to Delete a Report

You can delete a report only if you created it.

To delete a report:

- From the landing page, right-click the report, and choose **Delete**, as shown in the following image.



How to Use the Alarms Module

The Alarms module lets you view, filter, acknowledge (ack), and annotate the alarms in the data source.

The following image demonstrates the Alarms Module.



You can use the Alarms module in the following contexts:

- While you preview a project. See [How to Begin Previewing Content](#).
- In a launched project. See [Launch](#).



Note

Before Project Assist 2.0, version 10, the Alarms module was called the Alarms Console module.

How to View Information in the Alarms Table

Hover over items in the following columns to read information about the alarm:

- **Timeline**—The times when states were in alarm, acked, or normal
- **Message Text**—The text triggered by the alarm
- **Notes**—The notes added by users
- **Source**—The path to the data metric
- **Alarm Data**—Information about the alarm configuration
- **Alarm Class**—The category for this alarm in the data source

The following image demonstrates how to read information about the alarm source by hovering over an item in the Source column.



How to Change the Date Range

Alarms modules use the global date range. See [Global Date Range](#).

To change the global date range:

- Click the date range in the top left corner of the Alarms module page or panel, as shown in the following image, and choose a new date range.



How to Change Columns

To change which columns appear in the Alarms module:

1. Hover over the three dots at the right of the page, as shown in the following image.



2. Use the check boxes to specify which columns to include.

How to Filter Alarms

You can filter alarms by class, priority, state, ack state, date range, or a custom search.

To filter which alarms appear in the console:

- Click the arrow in the top right corner to view and use filter options.

The following image demonstrates the filter options.



How to Roll Up Alarms

When you roll up alarms, you group the alarms so that only one table row appears per metric.

To enable alarm rollup:

- Check the check box next to **Rollup Alarms** in the bottom right corner of the Alarms module page or panel, as shown in the following image.



To disable alarm rollup, clear the check box.

How to Ack an Alarm



Note

These steps write to the data source.

To acknowledge (ack) an alarm:

1. Check the check box next to one or more alarms, as shown in the following image.



2. Click **Ack Alarms** at the top right, as shown in the following image.



How to Add a Note to an Alarm



Note

These steps write to the data source.

To add a note to an alarm:

1. Check the check box next to one or more alarms, as shown in the following image.



2. Click **Add Note** at the top right, as shown in the following image.



3. Enter the note text.
4. Click **Apply**.

How to Use the Schedules Module

The Schedules module lets you access and edit the weekly and special event schedules in the data source.

You can use the Schedules module in the following contexts:

- While you preview a project. See [How to Begin Previewing Content](#).
- In a launched project. See [Launch](#).

Note

In Project Assist 2.0, version 10, the modules formerly called the Weekly Schedule module and Calendar Schedule module have been combined as the Schedules module.

In the Schedules module, you can choose from the **Weekly**, **Special Events**, and **Properties** tabs.

The following image shows an example of the Schedules module, with the **Weekly** tab selected.



Notes



- You always must click **Save** to write to the data source.
- You can click **Reload** to discard the changes since the last save.

How to Work with Weekly Schedules

This section covers how to choose a schedule and create weekly recurring events in the data source.

To work with weekly schedules, first choose the **Weekly** tab in the Schedules module, as shown in the following image.



How to Choose a Schedule

To choose the schedule to view, use the drop-down menu in the top right corner, as shown in the following image.



How to Create a Weekly Event

To create a new event:

1. Right-click in an area where there is not currently an event.
2. Choose **Create Event**, as shown in the following image.



How to Edit a Weekly Event Time

The following interactions edit the start and end times of an event:

- Drag the top or bottom of the event rectangle to change the start or end time.
- Click and drag the event rectangle to change its time.
- Right-click the event rectangle and choose **Edit Value**, and then change the **Start** and **Finish** times and click **Apply**.

The following image demonstrates how to open the Edit Value popup window.



The following image shows the Edit Value popup window.



Note

To close the Edit Value popup window, click the red dot.

1. To create an all-day event, right-click the event and choose **All Day Event**, as shown in the following image.



This causes the event to last from midnight to midnight.

How to Edit a Weekly Event Value

To edit a value in the schedule:

1. Right-click the event and choose **Edit Value**, as shown in the following image.



2. Enter the value, and then click **Apply**. To enter a null value, check the check box for **Null**.

The following image shows the Edit Value popup window.



Note

To close the Edit Value popup window, click the red dot.

How to Copy and Paste a Day

To copy and paste all events in one day to another day:

1. Right-click in any event during the day, and choose **Copy Day**, as shown in the following image.



2. Right-click anywhere in the target day, and choose **Paste Day**.



Caution

All previously existing events in the target day are removed.

How to Set Monday through Friday

To re-use the events in a day as the schedule for all weekdays:

- Right-click anywhere in the day and choose **Apply M-F**, as shown in the following image.



Caution

All previously existing events in the target days are removed.

How to Delete Weekly Events

The following interactions delete events:

- To delete a single event, right-click the event and choose **Delete Event**, as shown in the following image.



- To delete all events in a day, right-click anywhere in the day and choose **Clear Day**, as shown in the following image.



- To delete all events in this schedule, right-click anywhere in the schedule and choose **Clear Week**, as shown in the following image.



How to Work with Special Events

Special events are exceptions to a weekly schedule.

To work with special events, first choose the **Special Events** tab in the Schedules module, as shown in the following image.




How to Choose a Schedule

To choose the schedule to view, use the drop-down menu in the top right corner, as shown in the following image.



How to Create a Special Event

To create an event:

1. Click the  plus sign icon, as shown in the following image.



2. Specify a name and scheduling type, as shown in the following image.



3. Click **Add Event**.

4. With the event selected in the event list, right-click in the hourly schedule and choose **Create Event**, to add events for the exception dates.

The following image demonstrates how to schedule a special event.




5. Edit the event as you would a weekly event. See [How to Edit a Weekly Event Time](#), [How to Edit a Weekly Event Value](#), [How to Delete Weekly Events](#).
6. Click **Save** to save your changes, as shown in the following image.



How to Edit a Special Event

To edit an event:

1. Select the event in the event list.
2. Click the  **Edit** icon, as shown in the following image.




3. Use the popup to edit the event. See [How to Create a Special Event](#).
4. Click **Save** to save your changes, as shown in the following image.



How to Delete a Special Event

To delete a special event:

1. Select the event in the event list.
2. Click the  **Delete** icon, as shown in the following image.



3. Click **Save** to save your changes, as shown in the following image.



How to Edit Schedule Properties

Schedule properties include the default value and the effective period.

To edit the schedule properties, first choose the **Properties** tab in the Schedules module, as shown in the following image.



How to Choose a Schedule

To choose the schedule to view, use the drop-down menu in the top right corner, as shown in the following image.



How to Edit Schedule Properties

You can control the following two properties:

- **Value**—This is the default value of the schedule, when events are not scheduled.



Note

To assign a null value, check the **Null** check box.

- **Effective Period**—This is the date range when this schedule is in effect.

You must click **Save** for your changes to take effect.

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[Next: User Permissions](#)

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Last update: **2021/09/20 15:03**

