

# **Crestron Fusion<sup>®</sup> Software Dashboard** Enterprise Management Platform

Reference Guide Crestron Electronics, Inc.

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# Glossary

# **Crestron<sup>®</sup> Fusion Software Dashboard**

# Introduction

The ability to create custom, interactive visualizations of data captured by Crestron Fusion is now available through the integration of the Crestron Fusion database with the Microsoft Power Bl<sup>®</sup> business intelligence tool. This document guides the user through the data capture process in three parts.

The first part, "The Crestron Fusion Schema," outlines the schema used by the Crestron Fusion Database. The intent of publishing the schema is to make it easy to locate the data and tables appropriate to retrieving, displaying, and analyzing Crestron Fusion logged data.

The second part, "The Power BI Template - Crestron Fusion Visualization Logic," is a guide to working with Power BI and the Crestron Fusion database.

The third part, "The Crestron Fusion Report Readiness Tool", provides instructions for using the simple included program to analyze an existing Crestron Fusion database for data presence and integrity required for reporting.

### **Prerequisites**

This document is intended for the user with a working knowledge of and experience using SQL.

Reporting success depends upon consistent data collection and accurate data. Following the SSI model in programming ensures that data will be present and properly formatted for report and BI delivery. To help validate the data, please use the Report Readiness Tool.

### **Disclaimer**

Crestron does not support destructive editing, including any write or execute operations that alter the data or existing schema in any way. Please contact FSG for assistance with database analysis, repair, or any data shaping. The schema may change from one version of Crestron Fusion to the next. Verify that any upgrades will not affect existing reports before installing new versions of Crestron Fusion.

# **The Creston Fusion Schema**

The Crestron Fusion database contains hundreds of tables for use by the application. This document does not intend to explain all of the tables. Instead, the focus is on the tables, relationships, and data that are used for logging and reporting.

### **General Schema Information**

The following are guidelines used to generate and store data in the Crestron Fusion database.

- Microsoft<sup>®</sup> SQL Windows<sup>®</sup> application is the only database package supported
- All LogTimeStamp entries are in UTC
- All meeting start- and end-times are in UTC
- IDs are typically assigned by the program via RVI files or are automatically generated by Crestron Fusion
- RVI (RoomView Information) files

### **Core Tables**

The following tables contain the property values for the primary objects in Crestron Fusion, such as rooms and assets.

The tables typically include a GUID field that is the Primary Key (PK) for the table. The core tables also include the friendly name for the object, such as the name of the room.

Core tables are related to other tables by associating, or mapping, the GUIDs to each other. For example, the CRV\_RoomMeetingMap includes the RoomID and associated MeetingID for the meetings in that room. The mapping tables are not typically required for reporting and are outside the scope of this document.

The following tables constitute the core tables:

- CRV\_Rooms: contains all of the room records
- **CRV\_Attributes:** contains all possible signals in the deployment Attributes may be part of all, some, or none of the rooms.
- CRV\_Assets: contains all of the assets in the deployment There are three types of assets: programmed, network, and inventory. Network assets include any asset that Crestron Fusion can connect to directly, like scheduling panels including TMPC-4SM, TSS-752, TSW-760 models. This also includes third-party Crestron connected displays, and Crestron RL systems.
- CRV\_Processors: contains all of the processors added to the deployment Typically, there is one processor per room. The association between a room and a processor is indirect through the symbol. A working, connected room in Crestron Fusion has three parts: a room definition, a processor, and a symbol. The symbol, representing the Crestron Fusion hooks in a program, is always associated with a processor and cannot exist in the database without the corresponding processor record. Once the symbol is assigned to a room, the association between the room and processor is made and signal status becomes visible in the monitoring interface.
- **CRV\_Symbols:** contains all of the symbols in the deployment A symbol is included in the program running on a processor. A symbol cannot exist in the deployment without a processor. There can be multiple symbols per processor but typically, there is one per room per processor.
- CRV\_Tree: contains all of the node records for the nodes defined in the tree.

### **Log Data Tables**

The log data tables contain the stored attribute (signal) values collected over time. Storage is based on the attribute logging rules set in the Crestron Fusion web client. Attributes are logged only when they change state, or when a Crestron Fusion connection is made to the control system or device. Crestron Fusion connection is established when a device or

control system is started, when a program is loaded or restarted, or when the network connection is reestablished after an interruption.

The following tables represent where log data is stored:

- CRV\_AttributeLog: tracks signal/attribute changes at the Room level
- **CRV\_SignalLog:** tracks signal changes at the symbol level. A room can have multiple symbols
- CRV\_ErrorLog: is used for error notifications sent to Crestron Fusion
- **CRV\_UsageLog:** is used for Device Usage, Display Usage, System Usage, and Room Usage (ROOM\_OCCUPANCY)
- CRV\_LogTextLog: is used for custom application that need to store data, may not be used
- CRV\_HelpRequest: is not used
- CRV\_HelpRequests: contains help ticket records of the help requests opened in each room
- CRV\_HelpRequestMessages: is not used
- CRV\_HelpResolutionSteps: contains the resolution notes when the ticket is closed
- CRV\_HelpResponses: contains responses, and the time/date of each, to the opened help request tickets for each room

### **Meeting Data Tables**

A room defined in Crestron Fusion is typically associated with a scheduling application to provide meeting information that is used for automation and reporting. Crestron Fusion stores elements of the meeting, including subject, organizer, start time, and end time. Additional information is also retained; including meetings made from a scheduling panel, unattended meetings, and cancelled meetings.

The following tables include the relevant meeting data used for reporting:

- CRV\_Meeting
- CRV\_MeetingInstance
- CRV\_MeetingActivity

### **Live/Current Value Tables**

The following tables display the current value of any attribute (signal):

- CRV\_RoomAttributeValues
- CRV\_SymbolAttributeValues

# **Core Table Details**

The structure of the core tables is described below, including field names, field descriptions and sample SQL queries to gather the most relevant reporting data.

**NOTE:** In the following tables, rows with green, bolded text are useful for reporting.

# **CRV\_Rooms**

CRV\_Rooms contain all of the room records.

#### CRV\_Rooms

KEY	NAME	TYPE	SIZE	NULL	DESCRIPTION
PK	RoomID	varchar	50	not null	Unique identifier (GUID)
-	RoomName	nvarchar	128	not null	Friendly room name as defined in Crestron Fusion or associated RVI file
-	RoomDescription	nvarchar	max	null	
-	RoomAlias	nvarchar	255	null	
-	RoomLocation	nvarchar	255	null	Used for Room Booking Wizard, Outlook <sup>®</sup> software Add-in and PinPoint™ app
-	RoomGroupwareURL	nvarchar	256	null	
-	RoomGroupwareUsername	nvarchar	128	null	
-	RoomGroupwarePassword	nvarchar	350	null	
-	RoomGroupwareUserDomain	nvarchar	128	null	
-	EControlLink,	nvarchar	255	null	
-	WebCamLink	nvarchar	255	null	
-	LocalOffsetIndex	int		null	
-	SecurityMaskInfo	nvarchar	max	null	
-	Created	datetime		not null	Date the record was created
-	LastModified	datetime		not null	Date the record was last changed
-	SendMeetingInvite	char	1	null	
-	GroupwareProviderType	nchar	25	null	The scheduling provider type for the room: Internal, EWS, EWSManaged, External, Google <sup>®</sup> software, etc.
-	SMTPAddress	nvarchar	512	null	Email address for the resource calendar
FK	GroupID	nvarchar	50	null	Group that the room is assigned to

(Continued on following page)

#### CRV\_Rooms (continued)

KEY	NAME	TYPE	SIZE	NULL	DESCRIPTION
FK	ServerID	nvarchar	50	null	Server that the room is assigned to
-	AssignedToSignalService	bit		null	
-	AssignedToScheduleService	bit		null	
-	TimeZoneID	nvarchar	55	null	
-	Туре	nvarchar	10	null	
-	AutoDiscovered	bit		null	
-	RoomAutomationDataChanged	bit		null	
-	TimeClockEventDataChanged	bit		null	
-	Latitude	float		null	
-	Longitude	float		null	
-	TrueUpEarliest	datetime		null	
-	TrueUpLatest	datetime		null	
-	InheritLatitudeLingitude	bit		null	
-	LastCalendarUpdated	datetime		null	
-	AdjacentLocation	nvarchar	255	null	Used for PinPoint app
FK	EndPointType	nvarchar	50	null	
-	AirMediaInfo	varchar	max	null	Used for PinPoint app
-	Capacity	int		null	
FK	RoomCategory	nvarchar	50	null	Lists the room type (Huddle, Conference, etc.). Default list included with Crestron Fusion, but is easily customizable. Required for many visualizations

Use the following SQL query to add this table to the Power Bi data set:

SELECT RoomID, RoomName, RoomLocation, GroupwareProviderType, SMTPAddress, GroupID, ServerID, Latitude, Longitude, AdjacentLocation, AirMediaInfo, Capacity, RoomCategory FROM CRV\_Rooms

# **CRV\_Attributes**

CRV\_Attributes contain all possible signals in the deployment. Attributes may be part of all, some, or none of the rooms.

KEY	NAME	ТҮРЕ	SIZE	NULL	DESCRIPTION
PK	AttributeID	varchar	50	not null	Unique identifier (GUID)
-	AttributeName	nvarchar	128	not null	Friendly attribute name as defined in Crestron Fusion or associated RVI file
-	AttributeType	char	1	not null	"D", "A", or "S" - Digital, analog, or serial
-	DefaultJoin	int		not null	
-	DefaultSlot	varchar	20	not null	
FK	GraphicSetID	varchar	50	Null	
-	XMLName	nvarchar	128	not null	
-	DefaultMinValue	int		Null	
-	DefaultMaxValue	int		Null	
-	DefaultIOMask	int		not null	
-	LogicalOperator	nvarchar	128	Null	
-	Reserved	char	1	Null	
-	ButtonOnText	nvarchar	128	Null	
-	ButtonOffText	nvarchar	128	Null	
-	ButtonChangeText	nvarchar	128	Null	
-	LogAttributedb	char	1	Null	
-	LogAttributeNTEvent	char	1	null	
-	LogCriteria	nvarchar	max	null	
-	SecurityMaskInfo	nvarchar	max	null	
-	Created	datetime		null	
-	LastModified	datetime		null	
-	TargetAttributeID	varchar	50	null	
-	DefaultAttribute	char	1	null	

#### CRV\_Attributes

Use the following SQL query to add this table to the Power Bi data set:

SELECT AttributeID, AttributeName, AttributeType FROM CRV\_Attributes

# **CRV\_Assets**

There are three categories of assets in Crestron Fusion based on their connection properties.

- Network Connected Assets are devices that Crestron Fusion can connect to directly without a control system. An associated driver defines the attributes (signals) that convey status and data to Crestron Fusion.
- Programmed Assets are assets defined in a program, typically conveyed to Crestron Fusion through an RVI file transfer. Crestron Fusion cannot directly connect to programmed assets; instead, Crestron Fusion receives status and data for programmed assets via the program running on the system where the asset is connected
- Asset connection type "None" are assets used for inventory tracking.

KEY	NAME	TYPE	SIZE	NULL	DESCRIPTION
PK, FK	AssetID	varchar	50	not null	Unique identifier
-	AssetName	nvarchar	255	not null	Friendly asset name as defined in Crestron Fusion or associated RVI file
-	SerialNumber	nvarchar	255	null	
FK	AssetTypeID	varchar	50	not null	Category that this asset is assigned to - used for reports
-	AssetTag	nvarchar	255	null	
-	MACAddress	nvarchar	20	null	
-	DateOfPurchase	datetime		null	
-	WarrantyExpiration	datetime		null	
-	Make	nvarchar	255	null	
-	Model	nvarchar	255	null	
-	Notes	nvarchar	Max	null	
-	LifeSpanYears	Int		null	
-	IPAddress	nvarchar	255	null	
FK	MaintenanceContractID	nvarchar	50	null	
-	ServiceInterval	Int		null	
-	ServiceIntervalIncrement	nvarchar	50	null	
-	LastService	datetime		null	
-	SecurityMaskInfo	nvarchar	Max	null	
-	Created	datetime		null	
-	LastModified	nvarchar	50	null	
-	RoomConfigured	char	1	null	

#### CRV\_Assets

(Continued on following page)

KEY	NAME	TYPE	SIZE	NULL	DESCRIPTION
FK	DriverID	varchar	50	null	Associated driver for Network connected assets
-	ConnType	nvarchar	255	null	Programmed assets = "Symbol", Network assets = "ActiveCNX", or "None"
-	Port	Int		null	
-	Password	nvarchar	350	null	
-	UseSSL	char	1	null	
-	Status	nvarchar	50	null	
FK	SymbolID	varchar	50	null	
-	SymbolSlotNumber	varchar	20	null	
-	IPID	Int		not null	
-	HostServer	varchar	255	null	
-	ConnectionDirection	nvarchar	255	null	
-	Key	nvarchar	50	null	
-	LastBootDate	datetime		null	If available, the last time the asset was started
-	FirmwareVersion	nvarchar	50	null	If available, the firmware version of that device
-	FirmwareVersionDateTime	datetime		null	If available the date of the current firmware version
-	ConnectionDirection	nvarchar	50	null	"Inbound", "Outbound", "None"

#### CRV\_Assets (Continued)

Use the following SQL query to add this table to the Power Bi data set:

SELECT AssetID, AssetName, AssetTypeID, Make, Model, LifeSpanYears, IPAddress, DriverID, ConnType, SymbolID FROM CRV\_Assets

# **CRV\_Processors**

Processors connect to Crestron Fusion in one of two directions:

- Crestron Fusion-to-Device Crestron Fusion initiates the connection to the device and retrieves the RVI file.
- Device-to-Crestron Fusion the device initiates a connection to Crestron Fusion, registers itself, and sends an RVI file defining the room, assets, and attributes that Crestron Fusion will expect.

KEY	NAME	ТҮРЕ	SIZE	NULL	DESCRIPTION
PK	ProcessorID	varchar	50	not null	Unique Identifier
-	ConnectionInfo	nvarchar	256	not null	IPAddress of the processor
-	CIPPort	int		not null	
-	SecuritCIPPort	int		not null	
-	ProcessorName	nvarchar	128	null	Friendly name of the processor
-	Location	nvarchar	128	null	
-	UserName	nvarchar	64	null	
-	UserPassword	nvarchar	350	null	
-	XMLFileDate	datetime		null	
-	SecurityMaskInfo	nvarchar	max	null	
-	Created	datetime		not null	
-	LastModified	datetime		not null	
-	MACAddress	nvarchar	20	null	MAC address of the processor
-	Make	nvarchar	255	null	
-	Model	nvarchar	255	null	
-	HostServer	nvarchar	255	null	
-	Key	nvarchar	50	null	
-	LastBootDate	datetime		null	Last time the system was started
-	FirmwareVersion	nvarchar	50	null	
-	FirmwareVersionDateTime	datetime		null	
-	ConnectionDirection	nvarchar	50	null	"Inbound", "Outbound", "None"

#### CRV\_Processors

Use the following SQL query to add this table to the Power Bi data set:

SELECT ProcessorID, ProcessorName, Make, Model, LastBootdate, FirmwareVersion, FirmwareVersionDateTime, MACAddress, ConnectionInfo, ConnectionDirection FROM CRV\_Processors

# **CRV\_Symbols**

CRV\_Symbols contain all of the symbols in the deployment. A symbol is included in the program running on a processor. A symbol cannot exist in the deployment without a processor. There can be multiple symbols per processor, but typically, there is one per room per processor.

KEY	NAME	TYPE	SIZE	NULL	DESCRIPTION
PK	SymbolID	varchar	50	not null	Unique Identifier for the symbol from RVI or assigned by Crestron Fusion
FK	ProcessorID	varchar	50	not null	The ID of the processor running the program that defines the symbol
-	IPID	int		not null	
-	UseSSL	char	1	null	
-	RoomID	varchar	50	null	The ID of the room where the symbol is associated
-	Version	int		not null	Version of the Crestron Fusion symbol in the program 6, 7, or 8
-	SymbolName	nvarchar	128	null	The friendly name of the symbol
-	XMLName	nvarchar	128	null	
-	AutoDiscover	char	1	null	
-	SecurityMaskInfo	nvarchar	max	null	
-	Created	datetime		not null	
-	LastModified	datetime		not null	
-	HostServer	nvarchar	255	null	

#### CRV\_Symbols

Use the following SQL query to add this table to the Power Bi data set:

SELECT SymbolID, ProcessorID, RoomID, SymbolName FROM CRV\_Symbols

# **CRV\_Tree**

CRV\_Tree contains all of the node records for the nodes defined in the tree.

CRV_T	CRV_Tree								
KEY	NAME	ТҮРЕ	SIZE	NULL	DESCRIPTION				
PK, FK	TreeNodeID	varchar	50	not null	Unique identifier. Default IDs are ROOT, ROOMS, DISCOVEREDOBJECTS				
	ParentNodeID	varchar	50	not null	Unique identifier of the node above in the tree				
	Name	nvarchar	128	not null	Friendly attribute name as defined in Crestron Fusion. Default names are ROOT,ROOMS, DISCOVEREDOBJECTS				
	SecurityMaskInfo	nvarchar	max	null					
	Created	datetime		not null					
	LastModified	datetime		not null					
	Bluetooth_uuid	varchar	50	null	Populated if a Beacon is associated with the room				
	Bluetooth_majorID	Int		null	Populated if a Beacon is associated with the room				

# **Log Data Table Details**

The structure of the log data tables is described below, including field names, field descriptions and sample SQL queries to gather the most relevant reporting data.

# CRV\_AttributeLog

CRV Attributel og

The CRV\_AttributeLog tracks signal/attribute changes at the Room level.

KEY	NAME	TYPE	SIZE	NULL	DESCRIPTION
-	LogID	varchar	50	not null	
-	AttributeID	varchar	50	not null	
-	RoomID	varchar	50	not null	
-	LogTimeStamp	Datetime		not null	
-	DigitalValue	Char	1	null	
-	AnalogValue	int		null	
-	SerialValue	nvarchar	255	null	
-	xFerStatus	varchar	16	null	

Use the following SQL query to add this table to the Power Bi data set:

SELECT AttributeID, RoomID, LogTimeStamp, DigitalValue, AnalogValue, SerialValue
FROM CRV\_AttributeLog

# **CRV\_SignalLog**

The CRV\_SignalLog tracks signal changes at the symbol level. A room can have multiple symbols.

KEY	NAME	TYPE	SIZE	NULL	DESCRIPTION
-	LogID	varchar	50	not null	
-	SignalID	varchar	50	not null	
-	LogTimeStamp	Datetim e		not null	
-	DigitalValue	Char	1	null	
-	AnalogValue	int		null	
-	SerialValue	nvarchar	255	null	
-	xFerStatus	varchar	16	null	

#### CRV\_SignalLog

Use the following SQL query to add this table to the Power Bi data set:

 ${\tt SELECT}$  SignalID, LogTimeStamp, DigitalValue, AnalogValue, SerialValue <code>FROM</code> CRV\_SignalLog

# CRV\_ErrorLog

The CRV\_ErrorLog reports error notifications sent to Crestron Fusion.

#### CRV\_ErrorLog

KEY	NAME	TYPE	SIZE	NULL	DESCRIPTION
-	LogID	varchar	50	not null	
-	LogTimeStamp	datetime		not null	
-	LogAction	nvarchar	255	null	
-	RoomID	varchar	50	not null	
-	Severity	Char	1	null	
-	Message	nvarchar	max	null	
-	ErrorID	nvarchar	50	null	
-	Data1	nvarchar	50	null	
-	Data2	nvarchar	50	null	
-	xFerStatus	varchar	16	null	

Use the following SQL query to add this table to the Power Bi data set:

SELECT LogTimeStamp, RoomID, Severity, Message FROM CRV\_ErrorLog

# CRV\_UsageLog

The CRV\_UsageLog is used for Device Usage, Display Usage, System Usage, and Room Usage (ROOM\_OCCUPANCY).

KEY	NAME	TYPE	SIZE	NULL	DESCRIPTION
-	LogID	varchar	50	not null	Unique identifier for the log entry
-	LogTimeStamp	datetime		not null	UTC time the record was created
-	RoomID	varchar	50	not null	Identifies the room recording the usage entry
-	DataType	nvarchar	255	not null	USAGE for devices; CALL for call statistics
-	Data1	nvarchar	255	null	TIME or
-	Data2	nvarchar	255	null	Asset Type
-	Data3	nvarchar	255	null	Asset Name
-	Data4	nvarchar	255	null	Last Number dialed for call statistics can be "Success" or "Failed"; "-" for device usage.
-	Data5	Int		null	Minutes of usage or call time
-	Data6	nvarchar	255	not null	Call Status for call statistics; "-" for device usage
-	Data7	nvarchar	255	null	"-" future use
-	Data8	nvarchar	255	null	"-" future use
-	xFerStatus	varchar	16	null	

#### CRV\_UsageLog

Use the following SQL query to add this table to the Power Bi data set:

SELECT LogTimeStamp, RoomID, DataType, Data1, Data2 'Asset Type', Data3 'Asset Name', Data4 'Last Number', Data5 'Usage Minutes', Data6, Data7, Data8 FROM CRV\_UsageLog

# CRV\_LogTextLog

LogText is a reserved table for custom applications that require storing data in a dedicated SQL table. The LogText table has room for up to five custom fields.

#### CRV\_LogTextLog

KEY	NAME	TYPE	SIZE	NULL	DESCRIPTION
-	LogID	varchar	50	not null	
-	LogTimeStamp	datetime		null	
-	RoomID	varchar	50	null	Identifies the room recording the log entry
-	Message	nvarchar	100	null	Custom field
-	Data1	nvarchar	50	null	Custom field
-	Data2	nvarchar	50	null	Custom field
-	Data3	nvarchar	50	null	Custom field
-	Data4	nvarchar	50	null	Custom field
-	xFerStatus	varchar	16	null	

Use the following SQL query to add this table to the Power Bi data set:

 ${\tt SELECT}$  LogTimeStamp, RoomID, Message, Data1, Data2, Data3, Data4 FROM CRV\_LogTextLog

# **Help Desk Data Table Details**

NOTE: CRV\_HelpRequest is not used.

The structure of the help desk data tables is described below, including field names, field descriptions and sample SQL queries to gather the most relevant reporting data.

### **CRV\_HelpRequests**

Contains help ticket records of the help requests opened in each room

#### CRV\_HelpRequests

KEY	NAME	TYPE	SIZE	NULL	DESCRIPTION
PK	HelpRequestID	varchar	50	not null	Unique Identifier for the request
PK,FK	RoomID	varchar	50	not null	Identifies the room originating the ticket
-	Message	nvarchar	max	null	Details of the request
-	MeetingID	nvarchar	50	null	Not used
-	Organizer	nvarchar	255	null	Not used
-	Status	nvarchar	10	null	
-	Туре	nvarchar	10	null	
-	Severity	Int		null	
-	OpenedDate	datetime		null	Date the help ticket was opened
-	ClosedDate	datetime		null	Date the help ticket was closed
-	Created	datetime		null	Date the record was created
-	LastModified	datetime		null	Date the record was modified
-	SymbollD	nvarchar	20	null	The symbol that the request came through
-	HelpRequestStyle	nvarchar	10	null	

# CRV\_HelpResolutionSteps

CRV\_HelpResolutionSteps contain the resolution notes when the ticket is closed.

CRV\_HelpResolutionSteps

KEY	NAME	TYPE	SIZE	NULL	DESCRIPTION
PK	HelpResolutionID	varchar	50	not null	
PK	RoomID	varchar	50	not null	Identifies the room originating the ticket
PK	HelpRequestID	varchar	50	not null	
-	Resolution	nvarchar	max	null	
-	UserID	nvarchar	50	null	
-	ResolutionDate	datetime		null	
-	Created	datetime		null	
-	LastModified	datetime		null	

# **CRV\_HelpResponses**

CRV\_HelpResponses contain responses, and the time/date of each, to the opened help request tickets for each room

KEY	NAME	TYPE	SIZE	NULL	DESCRIPTION
PK	HelpResponselD	varchar	50	not null	Unique identifier for the response
PK	RoomID	varchar	50	not null	Identifies the room receiving the response
PK	HelpRequestID	varchar	50	not null	The ID of the request that invoked the response
-	Response	nvarchar	max	null	The message sent
-	UserID	nvarchar	50	null	The Crestron Fusion user sending the response
-	ResponseDate	datetime		null	Date the response was sent
-	Created	datetime		null	Date the DB record was created
-	LastModified	datetime		null	Date the DB record was last changed

CRV\_HelpResponses

#### NOTE: This query combines relevant data from the three Help Desk Data tables.

SELECT r.RoomName, r.RoomID, h.OpenedDate, h.Message, rsp.ResponseDate,rsp.Response, hrs.ResolutionDate, hrs.Resolution, hrs.ResolutionDate, hrs.UserIDFROM CRV\_HelpRequests hJOIN CRV\_Rooms r ON h.RoomID = r.RoomIDJOINCRV\_HelpResolutionSteps hrs ON h.HelpRequestID = hrs.HelpRequestIDLEFTOUTER JOIN CRV\_HelpResponses rsp ON h.HelpRequestID = rsp.HelpRequestID

# **Meeting Data Table Details**

The structure of the meeting data tables is described below, including field names, field descriptions and sample SQL queries to gather the most relevant reporting data.

**NOTE:** References to iTunes<sup>®</sup> software indicate field names in the database where Itunes configuration information is stored. Crestron Fusion supports publishing to itunesU for CaptureHD applications.

# **CRV\_Meeting**

The CRV\_Meeting table contains a copy of the meeting records discovered from the scheduling provider via browsing, scheduling panel operations, or the backfill process.

The subject and organizer for the meeting are stored here, in addition to the start and end time.

For recurring meetings, the CRV\_Meeting table only contains root meeting and the recurrence pattern, not the specific instances. The instances are stored in the CRV\_MeetingInstance table.

KEY	NAME	ТҮРЕ	SIZE	NULL	DESCRIPTION
PK	MeetingID	varchar	50	not null	Unique Identifier assigned by Crestron Fusion
-	MeetingComment	nvarchar	max	null	
-	Created	datetime		not null	
-	LastModified	datetime		not null	
-	isEditable	char	1	not null	
-	isEvent	char	1	null	
-	Organizer	nvarchar	255	null	Organizer defined in the meeting metadata
-	XMLInfo	nvarchar	max	null	
-	MeetingInviteSent	char	1	null	
-	StartTime	datetime		null	Scheduled Start time of the meeting
-	EndTime	datetime		null	Scheduled End time of the meeting
-	Recurrence	nvarchar	1000	null	
-	Subject	nvarchar	250	null	Subject of the meeting
-	Location	nvarchar	250	null	
-	RecurrenceEnd	datetime		not null	
-	RecurrenceCount	int		null	
-	TimeZonelD	nvarchar	255	null	Time zone of the Crestron Fusion user as set in their profile
-	RecordFlag	bit		not null	

#### CRV\_Meeting

(Continued on following page)

KEY	NAME	TYPE	SIZE	NULL	DESCRIPTION
-	LiveStreaming	bit		not null	
-	RecordingPassword	nvarchar	20	null	
-	BeginCaptureMinutes	int		null	
-	EndCaptureMinutes	int		null	
FK	ProfileID	uniqueidentifier		null	
-	CaptureSize	nvarchar	20	null	
-	LiveStreamingAddress	varchar	20	null	
-	NotifiyOrganizer	bit		null	
-	LastDemoCreated	datetime		null	
-	ItunesAuthor	nvarchar	50	null	
-	ItunesCategories	nvarchar	max	null	
-	ItunesKeywords	nvarchar	50	null	
-	ItunesSubtitle	nvarchar	50	null	
-	ItunesSummary	nvarchar	max	null	
-	ItunesImage	nvarchar	250	null	
-	RssCategories	nvarchar	250	null	
-	ItunesUCategory	nvarchar	10	null	
-	GroupwareMeetingID	varchar	500	not null	Unique Identifier for Exchange meetings defined in Exchange
-	GroupwareAltID	varchar	500	not null	

#### CRV\_Meeting (continued)

# **CRV\_MeetingInstance**

Use this table for calculating total meeting times.

The CRV\_MeetingInstance table contains a record of each individual instance in a recurring meeting as well as a record of any non-recurring single meeting. The subject and organizer are stored in the CRV\_Meeting table. The tables are related by the MeetingID field. Each instance of a recurring meeting has the same MeetingID, but each instance of the recurrence has a unique InstanceID. Crestron Fusion keeps a more accurate record of meetings than the scheduling provider. If the organizer deletes a completed meeting after the end time, the record is lost from the scheduling provider forever. Crestron Fusion, however, maintains the record and tags those meetings as "DeletedFromProvider", a flag that is found in the CRV\_MeetingInstance table.

KEY	NAME	TYPE	SIZE	NULL	DESCRIPTION
FK	RoomID	varchar	50	not null	Room identifier for the location of the meeting
FK	MeetingID	varchar	50	not null	MeetingID of the parent meeting record. There may be multiple instances for a recurring meeting that will all have the same MeetingID
-	InstanceID	varchar	500	null	Identifier for the current instance
PK	SeqNumber	int		not null	Unique number to identify the sequence of meetings in a recurring meeting. Relates to the Meeting Activity table.
-	IsAdHoc	bit		not null	Not used
-	Created	datetime		not null	
-	LastModified	datetime		not null	
-	StartTime	datetime		not null	Scheduled start time of the meeting
-	EndTime	datetime		not null	Scheduled end time of the meeting
-	OriginalStartTime	datetime		not null	
-	OriginalEndTime	datetime		not null	
-	Occurred	bit		not null	Indicates that the meeting occurred at the scheduled time.
-	DurationMinutes	int		null	
-	DeletedFromProvider	bit		not null	Flag indicates a meeting deleted from the provider after it occurred. Crestron Fusion keeps a record of this for reporting purposes.
-	Subject	nvarchar	250	null	
-	AltID	varchar	500	null	

#### CRV\_MeetingInstance

# **CRV\_MeetingActivity**

The CRV\_MeetingActivity table includes additional information about meetings that have been processed or manipulated after the initial booking.

KEY	NAME	TYPE	SIZE	NULL	DESCRIPTION
FK	InstanceSeqNumber	int		not null	Corresponds to the SeqNumber in the MeetingInstance table
-	ActivityType	varchar	20	not null	
-	ActivitySubType	varchar	20	not null	"Declined", "DeclinedWarning", CheckInFailed", CheckinFailedWarning", "Trimmed"
-	ActivitySource	varchar	20	not null	
-	TimeOfActivity	datetime		not null	
-	Message	nvarchar	max	null	

CRV\_MeetingActivity

Use the following SQL query to add this table to the Power Bi data set:

**NOTE:** This query combines relevant data from the above three meeting tables.

SELECT R.RoomName, I.RoomID, M.MeetingID, I.InstanceID, M.Organizer, I.Subject,

I.StartTime, M.StartTime, I.EndTime, M.EndTime, M.GroupwareMeetingID,

 $\texttt{M.GroupwareAltID}, \texttt{M.Recurrence}, \texttt{M.RecurrenceEnd}, \texttt{M.RecurrenceCount}, \texttt{I.IsAdHoc}, \texttt{M.RecurrenceCount}, \texttt{I.IsAdHoc}, \texttt{M.RecurrenceEnd}, \texttt{M.RecurrenceCount}, \texttt{I.IsAdHoc}, \texttt{M.RecurrenceEnd}, \texttt{M.RecurrenceCount}, \texttt{I.IsAdHoc}, \texttt{M.RecurrenceEnd}, \texttt{M.RecurrenceCount}, \texttt{I.IsAdHoc}, \texttt{M.RecurrenceEnd}, \texttt{M.RecurrenceCount}, \texttt{M.Recurr$ 

I.Occurred, I.DeletedFromProvider, A.ActivitySource, A.ActivityType,

A.ActivitySubType, A.Message, A.TimeOfActivity FROM CRV\_Meeting MJOIN

CRV\_MeetingInstance I ON M.MeetingID = I.MeetingID JOIN CRV\_MeetingActivity A ON I.SeqNumber = A.InstanceSeqNumber JOIN CRV\_Rooms R ON I.RoomID = R.RoomID

# **Other Pertinent Meeting Info**

The CRV\_MeetingActivity table is where Ad Hoc, No Show, End Early, and Extend Meeting information is stored.

The ActivitySource field has the following possible values:

- Device meeting data processed by a device like a scheduling panel
- WebClient meeting data processed by the Crestron Fusion web client
- CheckEmails meeting data processed by Backfill
- Notification indicates that this activity was generated by a EWS notification.
- Crestron PinPoint<sup>™</sup> meeting data processed by the Crestron PinPoint app

The ActivitySubType field has the following possible values:

- Unknown
- Extended meetings that have been extended
- CheckinFailed
- Declined meetings identified as no show
- Removed meetings that have been deleted
- Reserved meetings scheduled from the touch panel
- DeclinedWarning recurring meetings that have a second consecutive no show and Crestron Fusion has sent a warning
- CheckinFailedWarning
- Trimmed meetings that have been trimmed due to an end meeting early event
- WebClient operation was performed by the Crestron Fusion web client

The ActivityType field has the following possible values:

- Added
- Deleted
- Updated

To find "Ad Hoc" meetings, use the following query:

SELECT \* FROM CRV\_MeetingActivity
WHERE ActivitySource='Device' AND ActivitySubType ='Reserved'

In some cases, the subject may identify Ad Hoc meetings. This may be "Default Subject," "Ad Hoc Meeting," "Walk-up Meeting," or anything else defined as the default meeting subject. If this is a consistent value, identify ad hoc meetings by filtering the subject in the CRV Meeting table.

To find No Show meetings, use the following query:

```
SELECT * FROM CRV_MeetingActivity
WHERE ActivitySubType ='Declined' OR ActivitySubType ='DeclinedWarning' OR
ActivitySubType ='CheckinFailed' OR ActivitySubType ='CheckinFailedWarning'
```

# **Live Value Table Details**

The structure of the live value tables is described below, including field names, field descriptions and sample SQL queries to gather the most relevant reporting data.

# **CRV\_RoomAttributeValues**

This table contains the attribute values for the room. There may be several similar attributes (signals) from different devices aggregated for the room based on logic rules set in the Crestron Fusion setup web client.

KEY	NAME	TYPE	SIZE	NULL	DESCRIPTION
PK,FK	RoomID	varchar	50	not null	
PK,FK	AttributeID	varchar	50	not null	
-	RawAnalogValue	int		null	
-	ScaledAnalogValue	int		null	
-	ScaledAnalogValueMin	int		null	
-	ScaledAnalogValueMax	int		null	
-	RawDigitalValue	int		null	
-	ScaledDigitalVaue	int		null	
-	RawSerialValue	nvarchar	max	null	
-	ScaledSerialValue	nvarchar	max	null	
-	ScaleGraphicIndex	int		null	
-	SignalLastReceived	datetime		null	

#### CRV\_RoomAttributeValues

Use the following SQL query to add this table to the Power Bi data set:

SELECT RoomID, AttributeID, ScaledAnalogValue, ScaledDigitalValue, ScaledSerialValue, SignalLastReceived FROM CRV\_RoomAttributeValues

# **CRV\_SymbolAttributeValues**

This table provides the individual values of every attribute in the database. In most cases, these will be the same as the values in the CRV\_RoomAttributeValues table. In some cases where the room program contains multiple "Fusion Room" definitions in a single room, this table can be used to locate the individual values that are summarized in the CRV\_RoomAttributeValues table.

KEY	NAME	TYPE	SIZE	NULL	DESCRIPTION
PK,FK	SymbolID	varchar	50	not null	
PK,FK	AttributeID	varchar	50	not null	
-	RawAnalogValue	int		null	
-	ScaledAnalogValue	int		null	
-	ScaledAnalogValueMin	int		null	
-	ScaledAnalogValueMax	int		null	
-	RawDigitalValue	int		null	
-	ScaledDigitalVaue	int		null	
-	RawSerialValue	nvarchar	max	null	
-	ScaledSerialValue	nvarchar	max	null	
-	ScaleGraphicIndex	int		null	
-	SignalLastReceived	datetime		null	

#### CRV\_SymbolAttributeValues

To view information concerning current room status, that is, if a room is booked, occupied, in-use, or any combination of those states, use the following SQL queries stored in the live data tables:

SELECT a.AttributeName, r.RoomName, v.ScaledDigitalValue FROM CRV\_RoomAttributeValues v JOIN CRV\_Attributes a ON v.AttributeID = a.AttributeID

JOIN CRV Rooms r ON v.RoomID = r.RoomID

WHERE a.AttributeName = 'Room Occupied' OR a.AttributeName = 'Meeting in Progress' OR a.AttributeName = 'System Power'

# **The Power BI Template - Crestron Fusion Visualization Logic**

The spaces in a building or campus have behaviors that vary based on the available technology, associated calendars, and business rules dictating who can book the space. A space may have an associated calendar from one of several scheduling providers, or may have no calendar defined. If a space includes an occupancy sensor, there must be a processor to relay the sensor status to the Crestron Fusion software. A processor may also be programmed to track the status of the other devices and sensors in the room.

For example, rooms might consist of the following (the distributed Power BI template uses these room types and business rules and is based on the Crestron Tower public demo at <u>https://fitc-publicdemo.crestronfusion.com</u>. Contact <u>fsg@crestron.com</u> for access to the demo):

ROOM TYPE	CALENDAR	<b>BUSINESS RULE</b>	PROCESSOR/ Symbol	OCCUPANCY
Conference Room	Yes	Anyone can book; No Ad Hoc bookings allowed; No Show enabled	Yes	Yes
Huddle Room	Yes	Anyone can book; Ad Hoc bookings allowed; No Show not enabled	Yes	Yes
Office	Yes	Shows the room owner's calendar.	Yes	Yes
Data Center	Yes	Monitor Status, Schedule automation events only	Yes	
Classroom	Yes	Anyone can book	Yes	Yes
Retail	Yes	Schedule automation events only	Yes	No
Open Office Area	Yes	Schedule automation events only	Yes	No
Common Area (includes vestibules, bathrooms, corridors, stairwells)	No	Not currently managed	No	No

Room Types and Business Rules for the Crestron Tower

Based on these rules, visualizations that include rooms that "anyone" can schedule, described as "bookable" rooms, are limited to Conference Rooms, Huddle Rooms, and Classrooms. Visualizations that show system usage or occupancy, with no scheduling, include a broader subset of rooms with devices monitored by Crestron Fusion. When System Power is on in these rooms, they are "in-use."

# **Filters**

The report data filters typically include date, hour, room type (category), and room name. Not all visualizations include all of the filters, but they can be added if desired.

Date			Business Hours		Room Type	Room Name				
Last	~	1		Months	$\sim$	All	$\sim$	Conference	Hydrogen Room	
m 11/27/2017 - 12/26/2017										

### **Report Tabs**

The first four tabs show status using current data as of the last refresh time.

- 1. Current Status Overview
  - There are several gauges on the first tab in the report provided with the template. The room counts depicted by the various gauges and controls vary depending on the data depicted.
    - Monitored Rooms Rooms that include a processor sending data to the Crestron Fusion application.
    - Rooms Bookable by Anyone Rooms with calendars that are available for anyone to book. This differs from an office or other space that may have a calendar but is not available to book.
  - Accessing the report does not automatically refresh the dataset.
  - The Last Refresh UTC message indicates the last time the data refreshed to the Power BI service. The data refreshes on demand by invoking a context menu entry from the dataset, or on a schedule defined in the Power BI service.



For any report that has been published to the Power BI Service, the time will be UTC. In the Power BI Desktop application, the time will be based on the local system time.

- The data is from the SSI attributes for "Room Occupied," "Meeting in Progress," and "System Power," values stored in the CRV\_RoomAttributeValues table.
- Scheduled Rooms The SSI model includes a digital signal that reports a value of "1" when there is a meeting in progress in that room. "Scheduled Rooms" only include rooms with a scheduling provider defined (other than the "NonBookable" provider), and must include the signal (attribute) "Meeting in Progress."
  - o A room is scheduled when the SSI signal "Meeting in Progress" =1
    - Percent of scheduled rooms = (scheduled rooms) / (rooms with calendars) \* 100
  - Occupied Rooms = A room is occupied when the SSI signal "RoomOccupied" =1
    - Percent of occupied rooms = (occupied rooms) / (rooms with occupancy) \* 100
  - o In Use Room = A room is in use when the SSI signal "SystemPower" = 1
    - Percent of in-use rooms = (in use rooms) / (rooms with system power)
       \* 100
  - o Occupied/Scheduled What percentage of occupancy of scheduled rooms?
    - Percent of occupied rooms that are scheduled = (occupied rooms)/(scheduled rooms) \* 100



2. Current Space Utilization

There are two visualizations on this tab of the report focused on the "Bookable Rooms," rooms available for anyone to book. Of that set of rooms, Currently Scheduled Spaces shows the percentage of each room type that is scheduled as compared to that of unscheduled rooms on a 100% scale. Currently Available Spaces looks at both the scheduled status as well as the occupied status (as squatters that have not booked the space may occupy some rooms) and shows the percentage of rooms that are actually available, either not booked or not occupied. This shows the true availability of shared spaces.

The data is from the SSI attributes for "Room Occupied" and "Meeting in Progress" values stored in the CRV\_RoomAttributeValues table.

#### Crestron Fusion Current Space Utilization CRESTRON. **Currently Scheduled Spaces** Space Availability RoomName Meeting In Progress Room Occupied Tiger Shark Room Classroom 43% 57% Sealion Room Conference Private Trading Room 4126 Private Trading Room 4125 Huddle 67% Oxygen Room Orca Room 0% 20% 40% 60% 80% 100 Mercury Room Meeting Room 9158 Currently Available Spaces (Not Booked or Occupied) Meeting Room 9155 0 Lab 5100 lable Rooms Ounavailal IT Huddle 0 Hydrogen Room 0 50% Huddle 8137 0 Huddle 8136 56% 44% Huddle 8135 0 Huddle 8134 0 33% Huddle 8133 Huddle 8132 0 40% 20% 60% 80% 1 = True; 0 = False Bookable Rooms Last Refresh UTC 33 1/19/2018 7:32:37 PM

Current Status Overview
 Current Space Availability
 Current Space Utilization
 Room Status Detail
 Top Room Usage
 Meeting Summary
 No Show
 Room Usage over Time
 Device Usage
 Device Usage Over Time
 Wired vs

3. Current Space Utilization

The visualization on this tab is focused on the "Monitored Rooms." Monitored Rooms have systems connected to Crestron Fusion that report occupancy. The visualization shows the currently occupied spaces compared to the unoccupied spaces. The table shows occupancy for each room indicated by a "1" (occupied) or a "0" (unoccupied).

The data is from the SSI attribute for "Room Occupied," values stored in the CRV\_RoomAttributeValues table.



4. Current Scheduled Room Status

This tab in the report contains status on both the space and the technology, including booking, occupancy, and rooms in use. At a glance, identify rooms occupied but not booked, rooms booked but not occupied, and rooms with systems on but vacant. The table shows the room-by-room status for each attribute with a corresponding "1" or "0". In the table, an empty field indicates that signal is not present in the application and is not available for that room.

The data is from the SSI attributes for "Room Occupied," "Meeting in Progress," and "System Power" values stored in the CRV\_RoomAttributeValues table.



The remaining tabs focus on historic data for both spaces and technology used in those spaces.

5. Top Scheduled Room Usage

Top 5 Rooms and Bottom 5 Rooms draw data from the room's calendar. Only the shared rooms, bookable by anyone, are included in this report.

In this template based on the Crestron Tower, bookable rooms are of the Classroom, Conference, and Huddle room categories (room types). Different databases and Crestron Fusion deployments may follow different business rules for space usage, and may use different Room Types. Templates may need an initial filter adjustment to align the reports with business data.


#### 6. Meeting Data Summary



This tab in the report shows an overview of meeting and scheduling history.

7. No Show Meetings

The No Show tab presents data regarding organizer activities: how many meetings each organizer creates and the percentage of those meetings that nobody attends, "No Show" meetings. The data is from the Meeting table (organizer), the Meeting Activity table (no-show records), and the Meeting Instance table (meeting counts). The raw No Show meeting count derives from the ActivitySubType field of the Meeting Activity table. The ActivitySubType field may contain one of four possible values indicating a No Show: "Declined," "DeclinedWarning," "CheckinFailed," or "CheckinFailedWarning."

			E ····			
ite	Business Hours	Room Type	Roo	om Name		No Show Meetings
last ~ 1 Years ~ ] 1/20/2017 - 1/19/2018	All	Classroom Conference Huddle	All		~	1546
Declined • Attended	No Show I	Percentage by C	Drganizer			
Grover Cleveland	5%		95%			
John Adams	5%		95%			
Building Committee	7%		93%			
Ronald Reagan	78		93%			
John Tyler	0%		94%			
Dwight D. Eisenhower	6%		94%			
junies ouchangin 0	16 20%	40%	60%	80%	100%	
	Meeting	g Counts by Org	janizer			
John Adams Grover Cleveland					987	
Herbert Hoover John Tyler		528 518				
Gerald R. Ford		506				
o	200	400	600	800	1,000	

8. Meetings over Time

This tab includes a line chart comparing meeting duration hours, occupied hours, and hours of system usage over time. Tables for each category show the individual session details. The visualization allows a quick determination of rooms that have squatters (room users that have not booked the space), technology that has been left on, meetings that are not attended. The data is from the UsageLog (system usage), MeetingInstance (meeting durations), and Occupancy (occupancy durations) tables in the dataset.



9. Device Usage

This report tab shows devices in use in occupied spaces, as well as an overall comparison of device type usage showing the most used devices. The data is from the UsageLog table in the dataset.



#### 10. Device Usage over Time

This tab in the report continues to focus on device usage, in this case with a visualization showing usage over time. Compare each asset type in its own bar graph to help identify trends. Data is from the UsageLog table in the dataset. Add or remove visualizations based on the unique asset types in the database.



#### 11. Wired vs. Wireless Presentations

Compare usage of the wired connections in the room to the wireless presentation gateways. These visualizations are similar to Device Usage over Time, but here the focus is specifically on presentations, which may need adjustment per the database. Data is from the UsageLog table in the dataset.



12. Offline Incidents

See the history of device connections over time. This visualization is a derivative of the ONLINE\_STATUS attribute history in the AttributeLog table. A supporting table visualization shows the room, time, and date of each offline incident.



#### 13. Meetings and Occupancy

Compare meeting durations to occupancy durations by room. This is similar to the room usage over time but compares data across rooms. At a glance, see the most used rooms and least used rooms, as well as the rooms that have squatters or have unattended meetings. Data is from the Occupancy table and the MeetingInstance table in the dataset.



#### 14. Notification Incidents

This tab presents several historical views of notifications forwarded to Crestron Fusion by programmed monitoring. Visualizations include Notifications by Room, Notifications by Message, and Notifications by Date. Filter by severity. By default, the report only looks at warnings and critical and fatal notifications, but it can easily include notices if required. All visualizations use data from the ErrorLog table.



#### 15. Help Requests

Similar to the Notification History, the Help Requests tab shows historical views of help requests sent to Crestron Fusion by room users. Visualizations include Help Requests by Room, Help Requests by Message, and Help Requests by Date. An additional visual allows filtering by room type to identify the rooms that may be the most troublesome. Data is based on the Help Requests table in the dataset.



# **Getting Started with Power BI**

The following sections provide a starting point for understanding and using Microsoft Power BI with the Crestron Fusion database and the Power BI template provided. For more indepth information, please follow the links to related Microsoft documentation. There is an abundance of information available on every Power BI topic freely available on the Internet.

- Overview: Power BI Desktop and Power BI Service
- Installing and Using the Power BI Template (.pbit)
- Installing the Power BI On-Premises Gateway
- Datasets: Importing Data
- Relationships
- Modifying/Customizing Tables
- Working with Date/Time/Time Zone
- Filtering Techniques
- Building a Dashboard
- Sharing Reports and Dashboards

### **Overview: Power BI Desktop and Power BI Service**

Microsoft Power BI has two components. The Power BI service is available at <a href="https://powerbi.microsoft.com">https://powerbi.microsoft.com</a>. To use the service, sign up for a Power BI Pro account. The Power BI Desktop application is available at <a href="https://powerbi.microsoft.com/en-us/desktop/">https://powerbi.microsoft.com/en-us/desktop/</a> as a free download.

The basic steps to use Power BI Service and Desktop with Crestron Fusion are the following:

- 1. Download and install the Power BI Desktop application.
- 2. Import data into Power BI Desktop application to build the dataset and create reports from that dataset.
- 3. Publish the dataset and report(s) to the Power BI Service
- 4. Download and install a Data Gateway to allow the Power BI Service to connect periodically to the Crestron Fusion SQL database.
- 5. Set a refresh schedule to keep the dataset current.
- 6. Edit the reports, create new visualizations, or build dashboards using the Power BI Desktop or the Power BI Service.
- 7. Share dashboards with others.

Basic building blocks in Power BI are the following:

- Visualizations
- Datasets
- Reports
- Dashboards
- Tiles

### Installing and Using the Power BI Template

- 1. Load the .pbit template file into Power BI Desktop.
- 2. Click on Edit Queries.

aal   🔒	5 @ <del>-</del>													Cre
File	Home	View	Modeling	н	elp									
Paste	X Cut È≞ Copy ≪ Format Painte	Get Data	Recent Sources •	Enter Data	Edit Queries •	Refresh	Solution Templates	Partner Showcase	New Page •	New Visual	E Text box Image C Shapes ▼	From Store	From File	Switch Theme •
	Clipboard		E	xternal o	data		Reso	urces		Ins	ert	Custom	n visuals	Themes
ш														

3. From the Query Editor, select Data source settings.



- 4. Select the **Change Source** button to add the database settings. Select the **Edit Permissions** button to add credentials with at least read-only permissions to the database.
- 5. When the permissions are applied, Power BI Desktop will prompt for permission to run the queries that populate the datasets. Click **RUN** for each prompt to allow the queries to execute.

Native Database Query	×
Do you approve running this native query? Your approval will also apply to any occurrences of the same native query in other documents.	
Native queries may be unsafe and alter the database. Because native queries may be rerun multiple times, those which do alter the database may result in incorrect or unpredictable behavior.	
fcp-0001sql:Crestron-Corporate:04.23.2015A_new	
Data source settings	>
Anage settings for data sources that you have connected to using Power BI Desktop.	
Data sources in current file     O Global permissions	
Search data source settings	21
fcp-0001sql;Crestron-Corporate.04.23.2015A_new	
fcp-0001sql;fitc-publicdemo_new	
Change Source Edit Permissions Cear Permissions *	
	-
	Close

## Installing the Power BI On-Premises Gateway

The on-premises gateway connects the Power BI service to the Crestron Fusion database. Using the gateway to make the connection avoids the need to open firewall ports. The gateway does not provide a constant, direct access to the database. Instead, the Power Bi service will periodically connect to the database according to a user-defined schedule or on-demand based on a user action.

Install the gateway directly on the SQL Server<sup>®</sup> software or another system that can access the SQL server. The Crestron Fusion application server is an ideal location for the gateway.

1. Download the gateway. Access the download site by clicking the **download** icon in the top right of the Power BI service interface.

Alternatively, go directly to <u>https://powerbi.microsoft.com/en-us/gateway/</u> and click the **DOWNLOAD GATEWAY** button.





2. Save the file to the system that will host the gateway, typically a Crestron Fusion application server.

On-premises data gateway installer کړ	
Start your on-premises data gateway installation.	
A gateway acts as a bridge between on-premises data (not in the cloud), and Power Logic Apps, and Microsoft Flow.	81, PowerApps,
Gateways should be installed on a computer that is always on.	
Performance may be slower on a wireless network.	
earn more	
Novt	Cancel

- 3. Locate and run the **PowerBIGatewayInstaller.exe file**. Choose the **On-premises data gateway (personal mode)**. If prompted, accept and install the Microsoft.NET framework installation (may require a reboot).
- 4. Register the gateway using the email address for your Power BI Pro account and sign in:

Ct On-pre	mises data gateway (	personal mode)	
Almost done.			
Installation was s	uccessful!		
Email address to	use with this gateway:		
Next, you need t	o sign in to register your gateway	<i>i</i> .	
Next, you need t	o sign in to register your gateway		
Next, you need t	o sign in to register your gateway	ι.	
Next, you need t	o sign in to register your gateway		
Next, you need t	o sign in to register your gateway	ĸ	
Next, you need t	o sign in to register your gateway		

When complete, the gateway shows as "Ready" in the dialogue.

- 5. Log in to the Power BI Pro service to associate the previously published dataset with the new gateway.
- 6. Choose **Manage gateways** from the settings drop-down menu. Select the name of the Gateway to associate it with a data source.

						$\mathbf{r}$	
	Power BI	8	My Workspace > Gateways			⊜ 🌣 ⊻ ?	۲
=	E	、	ADD DATA SOURCE			Manage personal storage 1.3 GB of 10 GB used	
ж ©	Recent		GATEWAY CLUSTERS	Gateway Cluster Settings Ad	dminis	Create content pack View content pack	
₽	Apps		> PublicPusion MASTERS	✓ Online: You are good to go. Gateway Cluster Name		Admin portal	
RQ	Shared with me			PublicFusion		Manage gateways	
Q	Workspaces		lest all connections	Department		Settings	
8	My Workspace	$\sim$				Manage embed codes	
				Description			

III Power BI	8	My Workspace > Gateways	⊜ ¢3 ∓ ;	e
=				
📩 Favorites		ADD DATA SOURCE	Gataway Cluster Settings Administrators	
E Recent		GATEWAY CLUSTERS	Gateway Cluster Settings Administrators	
🗜 Apps		MASTERS	✓ Online: You are good to go.	
g <sup>Q</sup> Shared with me			① Add data sources to use the gateway	
🕒 Workspaces		Test all connections	Gateway Cluster Name	
8 My Workspace			MASTERS	
			Department	
			Description	
			Contact Information	
			ppfisterer@crestron.com	

 Click Add data sources to use the gateway. Select SQL Server as the Data Source Type and enter the information to connect to the Crestron Fusion Database. Use Basic Authentication if SQL credentials are used or Windows<sup>®</sup> Authentication for domain credentials.

	Power BI	8	My Workspace > Gateways		ē	ø	Ŧ	?	۲			
≡ *	Favorites	GATEWAY CLUSTERS > PublicFusion > MASTERS		Data Source Name								
©	Recent		New data source	FITC-MSTRS								
₽	Apps		Test all connections	Data Source Type SQL Server				•				
RR	Shared with me			Server								
Q	Workspaces			10.0.0.5								
R	My Workspace			Database				_				
				FITCMSTRS								
				Authentication Method								
				Basic •								
				The credentials are encrypted using the key stored on-premis Username	ies on the gatev	ay serve	r. <u>Learn</u>	more				
				username								
				Password								
				> Advanced settings								
7	Get Data			Add Discard								

8. Click the Add button. Look for Connection Successful in the response screen.

#### The Gateway is set up and working.

ADD DATA SOURCE	
	Data Source Settings Users
GATEWAY CLUSTERS	
> PublicFusion	Connection Successful
✓ MASTERS	* Connection Successitul
THE METRIC	① Next Step: Go to the <u>Users tab</u> above and add users to this Data Source
HIC-MSIKS	
	Data Source Name
Test all connections	ETIC-MSTRS
reaction connections	

With the gateway in place and connected, data is refreshed on demand or on a schedule defined by the user. Add up to eight refresh times.

III Power BI	My Workenace > Gatewaye		Settings for BladeServer
	my workspace > Galeways	BladeServer	
	GATEWAY CLUSTERS	CrestronFusionData v1.01.02	Last refresh succeeded: Wed Dec 27 2017 09:12:42 GMT-0500 (Eastern Standard Time) Next refresh: Wed Dec 27 2017 12:30:00 GMT-0500 (Eastern Standard Time)
☆ Favorites >	> PublicFusion	Creation Euclide Date vol 01 02	Refresh history
22072.) 200	~ MASTERS	Crestion Pusion Data VI.01.03	
Recent	FITC-MSTRS	Meeting Data	<ul> <li>Gateway connection</li> </ul>
H Apps			Data source credentials
$g^{R}$ Shared with me	Test all connections		<ul> <li>Scheduled refresh</li> </ul>
I Workspaces	BladeServer		Keep your data up to date
	LAST REFRESH SUCCEEDED:		On On
My Workspace	Wed Dec 27 2017 09:12:42 GMT-0500 (Eastern Standard Time)		Refresh frequency
REPORTS	Next refresh : Wed Dec 27 2017 12:30:00 GMT-		Daily
BladeServer	0500 (Eastern Standard Time)		Time tone
CrestronFusionData v1.01.03	RENAME		/UTC-05:00) Factern Time (US and Canada)
Devices	PENADAG		Tour answer eastern unite for any emission.
Meeting Data	REMOVE		Time
WORKBOOKS	SCHEDULE REFRESH		9 • 00 • AM • X
DATASETS	REFRESH NOW		12 Y 30 Y PM Y X
BladeServer	ANALYZE IN EXCEL		12 · 30 · m · M
CrestronFusionData v1.01.02	QUICK INSIGHTS		3 • 30 • PM • X
CrestronFusionData v1.01.03 Meeting Data	DOWNLOAD .PBIX		Add another time
	SECURITY		And an and a CRA MILLION
7 Get Data			Send refresh failure notification email to me

### **Datasets: Importing Data**

The Crestron Fusion database is always a Microsoft SQL database. The Power BI Desktop application connects to this database to build and publish to the Power BI service.

<mark>#   🗄 🕤 🖉 =  </mark>					
File Home N	/iewModeling	Help			
Paste 💞 Format Painter	Get Data - Sources	Enter Edit Data Queries	Refresh	Solution Partner Templates Showcase	New New Visual Chapter + Contraction - Contr
Clipboard		External data		Resources	Insert

For a new Power BI Desktop workspace, follow the **Get Data** link on the splash screen to make a new dataset.



Choose **SQL Server Database** and click the **Connect button**. Provide the SQL database Server and Database name. Select **Import** (DirectQuery is not supported using the Crestron Fusion Dashboard template). Power BI Desktop will return a list of all tables in the database and allow selection of the tables of interest for import into the dataset.

Instead of importing the full tables it is better to streamline the data by only importing the necessary fields. Expand the advanced options where an SQL query is added to produce specific data for the dataset.

Repeat for each SQL query that needs to be included in the complete dataset. The Crestron Fusion Schema section of the document includes suggested queries to add the most useful data to the dataset. This ensures the dataset includes only tables and fields required for reports.

Jan Castings -	P D	CRV_RoomAttributeValues Preview downloaded on Thursday, Nove	mber 30, 2017	Cà	sql0001 Distabele (optional)
ay apares	Lo	Record	alD ArreiburalD Raudoulochlabs		crestronfusion
CRV_Maintenance	~	01551100 61+6 16+1 0100 0/1+0+06011	Attributero	wannerstoff vante	Data Connectivity mode 🚯
CRV_MaintenanceContract		0155110-6446-4641-0100-0-140404017	Automotio	^	• Import
CRV Meeting		02551200 64e6 46e3 9209 9/1e9406912	AirMedia Online	1	O DirectQuery
CIV MeetingActions		03551280-64e6-46e3-9709-9c1e9a06917	AM-100 P		+ Advanced options
CRV Manting Setup		025512/0-64e6-46e3-9709-9c1e9a0/6917	AM-100 Login Code	7.	Command timeout in minutes (optional)
in conjunctingActivity		025512f0-64e6-46e3-9709-9c1e9a0f6917	AUTHENTICATE_REQUEST		
CRV_Meetinginstance		025512f0-64e6-46e3-9709-9c1e9a0f6917	AUTHENTICATION_FAILED		SQL statement (optional, requires database)
CRV_MeetingPeopleRoleMap		025512f0-64e6-46e3-9709-9c1e9a0f6917	AUTHENTICATION_SUCCEEDED		Select RoomID, RoomIame, RoomLocation, GroupwareProviderType, SMTPAddress, GroupID, ServerID, Latitude.Longitude.AdjacentLocation.AirRediaInfo.Capacity.RoomCategory From CRV Rooms
CRV_MeetingRoleMap		02551210-64e6-45e3-9709-9c1e9a0/6917	Booked and Unoccupied		
CRV_MeetingRoleOptionMap		025512f0-64e6-46e3-9709-9c1e9s0f6917	Broadcast Msg Active		
CRV_NodeLocationMap		025512/0-64e6-46e3-9709-9c1e9a0/6917	Broadcast Type		
CRV PresetFields		025512f0-64e6-46e3-9709-9c1e9a0f6917	BROADCAST_MSG		
CBV Presets		025512f0-64e6-46e3-9709-9c1e9a0f6917	BROADCAST_MSG_TYPE		
		025512f0-64e6-46e3-9709-9c1e9a0f6917	Cable Box		
I III CKV_Processors	- 55	02551200-64e6-46e3-9709-9c1e9a006917	Cable Box Online		
CRV_ResolutionNotes		025512f0 64e6 46e3 9709 9c1e9a0f6917	Cable Channel		Include relationship columns     Include relationship
CRV_RoleOption		025512f0 64e6 46e3 9709 9c1e9#0f6917	Cleaning		Inable SOL Server Fallover support
CRV_Room_Alias		0155120 6446 4645 9709 90199006917	Clear broadcast Misg		
CRV_RoomAssetMap		0155120 646 464 90 90 90 90 90 90 90	Closef cirrors		
CRV_RoomAttributeValues		02551200-64e6-46e3-9709-9c1e9a0r6917	002		
CRV_RoomCustomFieldMap		02551210-64e6-46e3-9709-9c1e9e016917	Compile Date	¥	
CEV ReceiContentialde	~				

## **Relationships**

Power BI will attempt to find relationships in the data imported into the dataset. However, it will likely be necessary to define relationships directly. The Power BI Desktop application has a tool for this, the Relationships icon along the left margin.



The Relationships tool provides a graphical way to make associations between tables by mapping key fields.

In the Crestron Fusion database, the Rooms table is the starting point of data for the reports. The RoomID field in the Rooms table relates to many of the other tables that reference this field. If Power BI does not automatically recognize these relationships, add them manually using the **Manage Relationships** tool.

File Home V	iew Modeling	Help											
Paste X Cut Paste Format Painter	Get Recent Data * Sources *	Enter Edit Data Queries •	Refresh	Solution Templates	Partner Showcase	New Page •	New Visual Carter Shapes •	From Store	From File	Switch Theme •	Manage Relationships	👘 New Measure	Publish
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				Ma	anage	relatio	nships						×
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					✓ On	line Status C	urrent (roomname)			Rooms (Roor	mName)		~
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					✓ On	line Status F	listory (Date)		1	Date (Date)			
					✓ On	line Status H	listory (RoomName)		1	Rooms (Roor	mName)		
					Ro	om Attribute	Values (AttributeID)			Attributes (A	(ttributeID)		
					Ro	om Attribute	e Values (RoomID)		1	Rooms (Roor	mID)		
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				Ne	ew A	lutodetect	Edit Dele	te					
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See more on how to manage relationships in Power BI at:

https://docs.microsoft.com/en-us/power-bi/desktop-create-and-manage-relationships

## **Modifying/Customizing Tables**

In some cases, the tables in the dataset require manipulation, or data shaping. Operations include renaming tables or fields, removing duplicate data, removing nulls, or removing errors from the tables in the dataset. Power BI allows redefining or transforming data types.

The initial dataset can be manipulated from two places in Power BI Desktop. Access the Query Editor by clicking the **Edit Queries** button on the tools ribbon or by right-clicking a query from the list and choosing **Edit Query** from the context menu.

The following mechanisms are available to shape or manipulate data in the dataset after it has been imported.

• Data Analysis Expressions (DAX) - enhance visualizations and reports with these functions and operators to generate values from the existing dataset.

https://docs.microsoft.com/en-us/power-bi/desktop-quickstart-learn-dax-basics

 Measures - create measures, based on DAX, using Power BI Desktop in either Report View or Data View. A calculator icon in the Fields list indicates a measure. Once it is created, use the measure in a visualization like any other field. In the Crestron Fusion Dashboard Power BI template, measures appear in several tables including Current Room Status, Current Room Status Pivot, Online Status Current, and UsageLog to calculate percentages and other relationships that are not already part of the data.

https://docs.microsoft.com/en-us/power-bi/desktop-measures

 Calculated Columns - Using DAX, define a new column in a table from Report View or Data View in the Power BI Desktop application. For example, the Crestron Fusion Dashboard UsageLog table includes a calculated column for Session Duration Hours that is based on the DAX formula Session Duration Hours = DIVIDE(UsageLog[Data5],60), which divides the minute values in the "Data5" column by 60. The DAX formula might include values from different tables using other mathematical operations.

A formula icon indicates a calculated column in the Fields list.



 Calculated Tables - in addition to the tables created from a data source, DAX is sometimes used to create table values. Use the New Table button to create a table using DAX. An example of a calculated table in the Crestron Fusion Dashboard template is the Date Table, described in the following section, "Working with Date/Time/Time Zone."

### Working with Date/Time/Time Zone

Note: Power BI does not have the ability to handle daylight savings time.

Each table that requires date/time filtering is modified to include columns that represent the local room date and the local room time.

The LogTimeStamp values used in the CRV\_AttributeLog, CRV\_ErrorLog, CRV\_UsageLog, and other log tables include seconds. This granularity makes associating time events across data tables very difficult, if not impossible. For this reason, the log time stamps are rounded to the minute before importing into the dataset. Further, the log time stamp represents the end of the session, not the start as might be assumed. Therefore, the session start times are calculated so that device and occupancy sessions can matched with the meeting times.

Follow these steps to prepare tables for creating date and time relationships:

- 1. Import time stamps using a SQL query that rounds to minutes.
- 2. Select \*, dateadd(mi, datediff(mi, 0, CRV\_UsageLog.LogTimeStamp), 0) RoundedTimeStamp (refer to "Rounding the Minutes" on page 54).
- 3. Calculate the StartSessionTimeStamp if required (refer to "Calculating Session Start Times in the Usage Logs" on page 54).
- 4. Merge table with the Rooms table to add the TimeZonelD column.
- 5. Merge table with the TimeZone table to add the UTCOffset column.
- 6. Add a calculated column to add the UTC formatted RoundedTimeStamp (refer to "Date/Time/Time Zone Operations" on page 54).
- 7. Add a calculated column to add the local time stamp based on the room's time zone (refer to "Date/Time/Time Zone Operations" on page 54).
- 8. Copy the room local time column and transform to date only.
- 9. Copy the room local time column and transform to time only.

These are the columns generated from the above process in the UsageLog:

- TimeZonelD from the merge in step 4 above
- UTCOffset from the merge in step 5 above
- LogTimeStamp from the Database (optional)
- RoundedTimeStamp Rounded during import based on the database SQL query (Date/Time/Timezone format)
- StartSessionTimeStamp calculated by subtracting the duration minutes from the RoundedTimeStamp
- StartSessionTimeStampUTC (Date/Time/Timezone format)
- RoomStartSession Start of session based on room's time zone (Date/Time/Timezone format)
- RoomStartSessionDate Date Table relationship (Date)
- RoomStartSessionHour Time Table relationship (Time)

### Date/Time/Time Zone Operations

Create a custom column and apply Date/Time/Timezone format with 0 for UTC:

```
Formula: DateTime.AddZone([Time],0)
Example:
= Table.AddColumn(#"Expanded TimeZones", "RoundedTimeStampUTC", each
DateTime.AddZone([RoundedTimeStamp],0))
```

Then create a new column for the local time zone by using the "SwitchZone" command and applying the local TZ offset in a custom column:

```
Formula: DateTimeZone.SwitchZone([TimeUTC],[UTCOffset])
```

```
Example:
= Table.AddColumn(#"Added Custom", "LocalTimeStamp", each
DateTimeZone.SwitchZone([RoundedTimeStampUTC],[UTCOffset]))
```

Duplicate the local time column twice; in the first column using transform, extract the Date. In the second extract the Time. The Local Time and Date are now available to reference in reports.

### Rounding the Minutes

LogTimeStamp entries include seconds, making it difficult to correlate with time-based data in other tables. With the LogTimeStamp entries rounded to the nearest second, or dropping the seconds by changing all to "00," the values match to the TimeTable.

Rounding needs to come from the initial SQL query since there is no function in PowerBI to do this:

dateadd(mi, datediff(mi, 0, CRV\_UsageLog.LogTimeStamp), 0) RoundedTimeStamp

### Calculating Session Start Times in the Usage Logs

Log time stamps (LogTimeStamp) for usage sessions indicate the time the session data writes to the database. These times correspond to the end of the session. To calculate the start of a session, subtract the "duration" from the LogTimeStamp. Use the rounded value for this operation.

#### The field formula to calculate session start times:

```
=Table.AddColumn(Source, "StartSessionTimeStamp", each [RoundedTimeStamp] - #duration(0,0,[Data5],0))
```

- RoomStartSession new calculated column RoundedTimeStamp "Data5" (minutes)
- RoomStartSessionDate Start of session in UTC
- RoomStartSessionHour

Use a similar technique for the AttributeLog, Error and Help Request tables.

### Date Table

A date table is the date reference to align meeting times and log time stamps across all tables. Render a date table using the following script.

Note: The date table does not include time as time reference uses a separate timetable.

```
Date =
ADDCOLUMNS (
CALENDAR (CALCULATE(MIN(Meeting[StartTime])), (NOW())),
"DateAsInteger", FORMAT ( [Date], "YYYYMMDD" ),
"Year", YEAR ( [Date] ),
"Monthnumber", FORMAT ( [Date], "MM" ),
"YearMonthShort", FORMAT ( [Date], "YYYY/MM" ),
"YearMonthShort", FORMAT ( [Date], "YYYY/MM" ),
"MonthNameShort", FORMAT ( [Date], "YYYY/mmm" ),
"MonthNameLong", FORMAT ( [Date], "mmmm" ),
"DayOfWeekNumber", WEEKDAY ( [Date] ),
"DayOfWeekNet", FORMAT ( [Date], "ddd" ),
"Quarter", "Q" & FORMAT ( [Date], "Q" ),
"YearQuarter", FORMAT ( [Date], "YYYY" ) & "/Q" & FORMAT ( [Date], "Q" ))
```

The start of the date table is the earliest meeting start-time on record. This may not work if there is no meeting data in the database. Alternately, use a hard-coded start date, such as CALENDAR ( 1/1/2016, (NOW()) )

The earliest data in one of the other log tables is also a useful start time for the date table. CALENDAR (CALCULATE(MIN(UsageLog[LogTimeStamp])), (NOW())

### Time Table

A time table is the time reference to align meeting times and log time stamps across all tables. The time table includes every hour and minute in a 24-hour day. Seconds are not included in the table, so all time-based data rounds to the nearest minute.

This table makes it possible to filter events for business hours.

#### Relating the Date and Time across Tables

Create a relationship between the Date field in the Date table and the fields that represent the local room date in the other tables. Create a relationship between the DayTime field in the TimeTable with the fields that represent the local room time in the other tables.

## **Filtering Techniques**

Filtering is a powerful mechanism in Power BI Service and Desktop to help isolate the desired data. In the Report design of the Power BI Desktop application, apply filters to the entire report, a report page, or a specific visualization. Simply drag the desired field to the appropriate filter level to apply the filter, and adjust the parameters.





The Crestron Fusion Dashboard template includes filters by date, hours, room type (room category), and room as part of the report. These filters utilize the slicer visualization applied to a specific field in a table.

Date	Business Hours	Room Type	Room Name	
Last $\checkmark$ 1 Months $\checkmark$	All 🗸	<ul> <li>Classroom</li> <li>Conference</li> </ul>	All	$\sim$
m 11/30/2017 - 12/29/2017		Huddle		

The slicer visualization is an effective tool for filtering. Add the desired field to act as a filter to the report and apply the slicer visualization. The slicer has several options to present. For example, the Date Slicer allows a choice to choose a date between two dates, before a specific date, after a specific date, from list of dates, from a drop-down list, or from a relative date range. The Crestron Fusion Dashboard template uses the Relative date slicer throughout the report, which can easily be change if desired. The Business Hours and Room Name filters use the drop-down list, and Room Type filter uses a List.



For more info on filtering see:

https://docs.microsoft.com/en-us/power-bi/power-bi-report-add-filter

## **Building a Dashboard**

Dashboards are only available in the Power BI Service, not in the Power BI Desktop application. The dashboard is a one-page collection of visualizations that acts as a storyboard, or a summary for the underlying reports. The key visualizations from the report data are included in the dashboard story.

Each visualization is "pinned" to the dashboard and appears as a tile. Each tile links back to the corresponding report tab. To pin a visualization to the dashboard, locate the visualization in the report and hover over the top right corner, exposing a pushpin icon. Click the icon and follow the prompts to add this to an existing or new dashboard.



Tiles can be resized and rearranged on the dashboard once they are pinned. Arrange the tiles logically to tell a story. The dashboard also includes some options for tile flow and a Q&A that intuitively finds data and helps create charts. Each tile on the dashboard has options to include a title and subtitle, display the last refresh time, or a customize an external link.



More info can be found at the following links:

https://powerbi.microsoft.com/en-us/guided-learning/powerbi-service-basic-concepts/ https://powerbi.microsoft.com/en-us/guided-learning/powerbi-service-dashboard-tiles/

## **Sharing Reports and Dashboards**

The dashboard can be shared within an organization by using share menu.

Power BI	<b>8</b> M	y Workspace > Crestron Fusion Dashboard v1.01.03					∠	¢ ±	? 🙂 8
			+ Add tile	ピ Usage Metrics	🗠 View related	Ø Set as featured	🛱 Favorite 🖾 Subscribe	🖻 Share	□ Web view ∨ ···
Favorites	>	Galaxie Ask a question about your data						Sha	e)
							L	-	
							<b></b>		
					Share	dashboard	1		
					Share Ar	TUSION DASHB	JARD V1.01.03		
					Recipients dataset fur	will have the sam ther restricts ther	ie access as you unless r n. <u>Learn more</u>	ow-level s	ecurity on the
					Grant acce	ss to			
					Enter ema	il addresses			
					Include an	optional messag	ie		
					🔀 Allow r	ecipients to share	e your dashboard		
					<mark>⊻</mark> Send e	mail notification	to recipients		
					Dashboard	Link 🛈			
					https://apj	o.powerbi.com/gi	roups/me/dashboards/7	a0abd74-	2654-41cd-b92d-61
								Sha	e Cancel

Sharing is one of several ways to provide Power BI reports to others. Dashboards can be shared within an organization. It may be possible to share outside an organization, but many domains are inaccessible, such as gmail.com and yahoo.com. In order to view a shared dashboard and report, users require a Power BI Pro account.

It is possible to publish a public link to the dashboard that anyone can see. There is no way to restrict access to this link. From the workspace File menu, choose **Publish to web** and click the button in the pop-up dialogue to create an embed link. Once the link is published, anyone on the Internet will have access to the dashboard and report.



Users viewing the shared dashboard can see reports in a read-only view. They do not have access to the dataset and cannot edit the report or make new reports. They can adjust the filters and slicers on the report but cannot save changes.

Revoke share privileges at any time from the Access menu in the Share Dashboard dialogue (see image above).

The ability to print reports is also available.

For more info see:

https://docs.microsoft.com/en-us/power-bi/service-how-to-collaborate-distributedashboards-reports

https://docs.microsoft.com/en-us/power-bi/service-share-dashboards

# **Crestron Fusion Report Readiness Tool**

### **Purpose**

The Crestron Fusion Report Readiness Tool determines what data may be available for Power Bl. It can also identify problems with data integrity if they exist, such as duplicate data, excessive log data, and long usage sessions spanning time periods greater than a single day, etc.

The Crestron Fusion Report Readiness Tool lists the available static reports and Power Bl visualizations, as well as the reports and visualization that will not produce results. It offers insight into the data for troubleshooting purposes and helps determine if an upgrade requires additional pre-upgrade steps.

## Launching the Report Readiness Tool

The Report Readiness Tool is a Microsoft Windows forms application consisting of a single executable file (.exe) and a configuration (.config) file. The optional rrt.pdb file pictured below, which provides debug information in the event the application fails, is not required for runtime.

The application operates as a stand-alone executable compatible with Microsoft Windows operating systems for desktop and server, including Windows 7/Windows Server 2008 R2 and later.

The Report Readiness Tool is part of the Crestron Fusion Dashboard download archive. Extract the three files from the archive to a new directory on a computer that has access to the database, like the Crestron Fusion application server.

Double-click **rrt.exe** to run the application as the currently logged in user. Alternately, hold down the shift key and right-click on **rrt.exe** and select **Run as different user** from the context menu if a different account is required for SQL access.





# **Operation**

After launching the application, the following screen appears.

Crestion rusic	IT DI Neport neaumess roc			
💿 Crestron Fusion BI Re	eport Readiness Tool	-		
SQL Server: Database: User ID: Password:		Authentication  Window  SQL	5	Always Required
Company: Address:		Run Report		
Contact:				
Phone:				
Email: ★ = Required F	ield			Version
		1.0.10.7		

### Crestron Fusion BI Report Readiness Tool Screen

Use the **Authentication** radio buttons to select the authentication method to connect to SQL. There are four required data entry fields for SQL authentication, or only two if using Windows Authentication.

Crestron Fusion Report Readiness Tool Screen

Crestron Fusion BI Report Readiness Tool	- 🗆 ×	]
SQL Server: Database: User ID: Password:	Authentication     OWndows     SQL	Clicking the "Windows Authentication radio button disables the user id and password text boxes
Company:	Run	
Address:	Report	
Contact:		
Phone:		
Email:		
★ = Required Field	1.0.10.7	

## **Running the tool**

Additional fields provide information to help identify the customer and deployments that appear on the report after clicking the **Run Report** button.

Fill out the form and click **Run Report**.

Crestron Fusion	n BI Report Readiness Tool		_		$\times$
SQL Server:	rvthree\sql2014		Authentication		
Database:	StLouis_Fusion_10_2	*	O Window	S	
User ID:	sa	*	© 54L		
Password:	******	*			
Company:	St. Louis		Run	1	
Address:	Some Address		Report		
	Somewhere				
Contact:	That Person				
Phone:	222-333-5555				
Email:	thatpersone@myemail.com				
🔹 = Requi	red Field				
- Roqui			1.0.10.7		

If any required fields are missing, the program prompts as pictured below.

Crestron Fusion BI	Report Readiness Tool		_		×			
SQL Server:	rvthree\sql2014	*	Authentication					
Database:	StLouis_Fusion_10_2	*	<ul> <li>Windows</li> </ul>					
User ID:		*	SQL					
Password:		*						
Company:			Run	1				
Address:			Report					
Contact:								
Phone:								
Email:								
Please Fill in All Req	uired Screen Elements							
Required Field								
			1.0.10.7					

Crestron Fusion BI Report Readiness Tool Screen

In the event that the SQL credentials have insufficient privileges, the program prompts as pictured below.

Crestron Fusion	BI Report Readiness Tool	- 🗆 X				
SQL Server: Database:	rvthree\sql2014 StLouis Fusion 10 2	Authentication     O Windows				
User ID:		O SQL				
Password: Company:		Run				
Address:		Report				
Contact:						
Phone:						
Email:						
Login failed. The login is from an untrusted domain and cannot be used with Windows authentication.						
* = Require	ed Field	1.0.10.7				

Crestron Fusion BI Report Readiness Tool Screen

In this example, the program created a report in fourteen seconds.

The data entered is stored in the configuration file and recalled every time the report runs.

Crestron Fusion BI R	eport Readiness Tool		_		×
SQL Server:	rvthree\sql2014	*	- Authentication		
Database:	StLouis_Fusion_10_2	*	O Window	IS	
User ID:	sa	*	SQL		
Password:	******	*			
Company:	St. Louis		Run	1	
Address:	Some Address		Report		
	Somewhere				
Contact:	That Person				
Phone:	222-333-5555				
Email:	thatpersone@myemail.com				
Done - report took 00:	00:14 to complete.				
Required F	Field		1.0.10.7		

## The Output

The application creates a Reports folder in the directory from where it runs. It also creates a Logs folder, which contains any errors encountered.

Manage			
perating System (C:)	> Temp > RRT_Test	~ Ū	Search RRT_Test
^	Name	Date modified	
	📙 Logs		12/21/2017 8:03 A
	Reports		12/21/2017 8:51 A
	🔕 rrt.exe		12/7/2017 2:27 PM
	🔊 rrt.exe.Config		12/21/2017 8:51 A
	🖨 rrt.pdb		12/7/2017 2:27 PM

To create the Reports and Logs folders:

- 1. Use windows file manager to open the directory where rrt.exe is located
- 2. Locate the Reports folder in that directory and open it
- 3. Double click the html report document. It will open in the default browser
- 4. If prompted for permission, click Allow



## **The Report**

### Heading

The heading of the report shows the SQL Server, Database, Company, Database size, and any other data entered on the original form.

Crestron Report Readiness Tool
Created 12/21/2017 8:51 AM
Prepared For: St. Louis
Some Address
Somewhere
That Person
SQL Server: rvthree\sql2014
Database: StLouis_Fusion_10_2
Fusion Database Schema Version: 10.3.10.22
Database size: 5,957 MB
### Reports and Visualizations

Based on data found, the report presents a list of available Crestron Fusion reports and Power BI visualizations from the included template.

The	following reports and visualizations are	e available based o	on data found
	Reports		Visualizations
1.	Assets by Room	1.	Overall Device Usage by Type
2.	Asset by Room Detail	2.	Device Usage over Time
з.	Assets by Type	3.	Notification History
4.	Asset by Type Detail	4.	Notifcations over Time
5.	Assets Online	5.	Help Requests over Time
6.	Booking and Occupancy	6.	Help Request History
7.	Device Usage	7.	Top Ten Organizers
8.	Display Usage	8.	Meetings Booked vs Free time
9.	Error Alerts	9.	Spaces Occupied vs Unoccupied
10.	Help Requests	10.	Booked and Occupied vs Available
11.	Help Requests and Resolutions	11.	Top 5 and Bottom 5 Spaces booked over time
12.	Instant Messaging	12.	Meeting Hours and Counts
13.	Log Text	13.	Meeting Usage over Time
14.	Meeting Duration	14.	Meeting Types over Time
15.	Meetings by Room	15.	No Show
16.	Room Utilization	16.	Device Usage by Meeting
17.	Top Meeting Organizers	17.	Device Usage Totals
18.	Rooms by Node		
19.	System Usage		

The report also lists Crestron Fusion reports and Power BI visualizations with no supporting data that subsequently will not render.

The following reports and visualizations are NOT available due to lack of data				
Reports	Visualizations			
	1. Meeting No Shows			
	1. Meeting No Shows			

### Data Analysis

Additional data analysis is available in the groups as shown below. If the result set of a query is a single row of data, then the result shows directly on the report, as in the **Number of Rooms** section. Larger, multiple row results are viewed by clicking + alongside the section header to expand the section. Collapse the section by clicking -.



In this example, the sizes of the Crestron Fusion tables are displayed by clicking the + sign on item 1).

Upgrading this database might require truncating several tables. The Crestron Fusion Support Group can assist with understanding the benefits and possible repercussions of data purging.

Crestron Fusion Table Sizes

Table Name	DB count	Bytes Used
CRV_SignalLog	8,340,128	1,300,209,664
CRV_MeetingActivity	2,715,005	155,107,328
CRV_MeetingRoleMap	2,320,267	283,680,768
CRV_UsageLog	578,242	135,798,784
CRV_MeetingInstance	182,285	35,028,992
CRV_AttributeLog	178,433	250,691,584
crv_meetinginstance_temp	178,019	36,798,464
CRV_BackFill	30,047	5,726,208
CRV_Meeting	16,627	8,347,648
crv_meeting_temp	16,489	8,511,488
CRV_RoomAttributeValues	7,581	835,584
CRV_SymbolAttributeValues	6,878	761,856
CRV_SymbolSignals	6,867	1,294,336
CRV_ErrorLog	6,805	1,867,776
CRV_RoomPeopleRoleMap	3,734	393,216

# **The SQL**

The final section of the report presents the SQL queries used to generate the data for each section. A database administrator may run these queries directly in Microsoft SQL Management Studio.

### **Crestron Fusion Table Sizes**

SELECT m.name 'Table Name' , im.rows 'DB count', (convert(bigint, im.dpages) \*
8192) 'Bytes Used' FROM sys.tables m INNER JOIN sys.sysindexes im ON (m.object\_id
= im.id AND im.indid < 2) WHERE im.rows > 1000 and (m.name like 'crv%' or m.name
like 'crv%' ) order by im.rows desc, m.name

### **Number of Rooms**

SELECT Count(\*) 'Room Count' FROM CRV\_Rooms WHERE Type = 'Room'

### **Room Counts per Groupware Provider**

SELECT isnull(GroupwareProviderType, 'NO GroupWare Defined') 'GW Provider Type' , Count(\*) 'Groupware Count' from CRV\_Rooms WHERE Type = 'Room' group by GroupwareProviderType union select 'Total Count', count(\*) FROM CRV\_Rooms WHERE Type = 'Room' order by Count (\*)

### **Logged Attribute Counts**

SELECT isnull(data2, 'Missing Attribute') 'Logged Attribute' , count(\*) 'Logged Attribute Count' from CRV\_UsageLog group by data2 Union select 'Total Count', count(\*) 'Logged Attribute Count' FROM CRV\_UsageLog order by Count(\*) desc

# Usage Log Data Overview with USAGE and STAT (Call Statistics)

SELECT isnull(DataType, 'No Data Type') 'Data Type', count(\*) 'Logged Attribute Count' from CRV\_UsageLog group by DataType Union SELECT 'Total Count', count(\*) 'Logged Attribute Count' FROM CRV\_UsageLog order by Count(\*) desc

# **Logged Attributes**

SELECT attributeid 'Attribute ID' , min (logtimestamp ) 'First Logged Date', max(logtimestamp) 'Last Logged Date', count(\*) 'Attribute Count' FROM CRV\_AttributeLog group by attributeid Union select 'Total Count', ' ', ' ', count(\*) 'Attribute Count' FROM CRV\_AttributeLog order by Count(\*) desc

# Logged Usage by Asset Type

SELECT R.RoomName 'Room Name', UL.data2 'Attribute ID', count(\*) 'Logged Attribute Count Per Room' FROM CRV\_UsageLog UL join CRV\_Rooms R on UL.RoomID = R.RoomID group by R.RoomName, UL.data2 Union SELECT 'Total Count', ' ', count(\*) 'Logged Attribute Count ' FROM CRV\_UsageLog order by count(\*) desc

# Logged Usage by Asset Name

SELECT data3 'Device', count(\*) 'Count of Devices' FROM CRV\_UsageLog group by data3 Union select 'Total Count', count(\*) 'Count of Devices' FROM CRV\_UsageLog order by count(\*) desc

### Meeting Counts Per Room

SELECT R.RoomName 'Room Name' , count(\*) 'Meeting Count' FROM CRV\_Meeting M join CRV\_MeetingInstance MI on m.meetingid = mi.meetingid Join CVR\_Rooms R on mi.Roomid = R.Roomid group by R.RoomName Union Select 'Total Count', count(\*) 'Meeting Count' FROM CRV\_Meeting order by Count (\*) desc

### **Notifications**

SELECT isnull(Message, 'Empty Message') Message , count (\*) 'Message Count' FROM CRV\_ErrorLog group by Message Union Select 'Total Count', count(\*) 'Error Count' FROM CRV\_ErrorLog order by count(\*) desc

### **Help Requests**

SELECT isnull(Message, 'Empty Message') Message, count (\*) 'Help Request Count'
FROM CRV\_HelpRequests group by Message Union Select 'Total Count', count(\*) 'Help
Count' FROM CRV\_HelpRequests order by count(\*)

# **Asset Types**

SELECT isnull(Conntype, ' ') 'Connection Type', AssetTypeid 'Asset Type', count(\*) 'Asset / Connection Type Count' FROM CRV\_Assets group by Conntype, AssetTypeid Union Select 'Total Count', ' ', count(\*) 'Asset Count' FROM CRV\_Assets order by count(\*) desc

### **Usage Data with Excessive Minutes**

SELECT top(1000) R.RoomName 'Room Name', UL.DataType 'Data Type' , UL.Data1, UL.Data2, UL.Data5 'Minutes' FROM CRV\_UsageLog UL Join CRV\_Rooms R on UL.RoomID = R.RoomID WHERE UL.data5 > 10000000

# Usage Data with Minutes Greater Than 1 day

SELECT top(1000) R.RoomName 'Room Name', UL.DataType 'Data Type' , UL.Data1, UL.Data2, UL.Data5 'Minutes' from CRV\_UsageLog UL Join CRV\_Rooms R on UL.RoomID = R.RoomID WHERE UL.data5 >= 1440 and UL.data5 < 10000000</pre>

# **Duplicate Attribute Log Data**

SELECT Top (1000) Attributeid 'Attribute ID' , R.RoomName 'Room Name', convert(nvarchar(23), LogTimeStamp, 121) LogTimeStamp, count(\*) 'Duplicate Row Count' FROM CRV\_AttributeLog AL Join CRV\_Rooms R on AL.roomid = R.roomid group by Attributeid, R.RoomName , convert(nvarchar(23), LogTimeStamp, 121) having count(\*) > 1 Order By Count(\*) desc

# **Duplicate Usage Log Data**

SELECT top(1000) R.RoomName 'Room Name' , datatype, data1, data2, data3, convert(varchar(23), logtimestamp, 121) 'Log Time Stamp' , count(\*) 'Duplicate Count' FROM CRV\_UsageLog UL Join CRV\_Rooms R on UL.RoomID = R.RoomID Group By r.roomname, datatype, data1, data2, data3, convert(varchar(23), logtimestamp, 121) having count(\*) > 1

# **Useful SQL Queries – Call Statistics**

SELECT r.roomname, u.\* from CRV\_UsageLog u join CRV\_Rooms r on u.roomID = r.roomid WHERE Datal ='call' order by LogTimeStamp desc

#### Occupancy

SELECT LogTimeStamp,RoomID,Data5 'Occupied Time' FROM CRV\_UsageLog
WHERE data2 = 'ROOM\_OCCUPIED'
SELECT r.RoomName, a.AttributeName, al.LogTimeStamp, al.AnalogValue
FROM CRV\_AttributeLog al
join CRV\_Attributes a on al.AttributeID = a.AttributeID
join CRV\_Rooms r on al.RoomID= r.RoomID
WHERE a.AttributeID = 'Online\_Status'
order by al.LogTimeStamp desc

### Find "Network Connected" Assets

SELECT AssetName, Model FROM CRV\_Assets WHERE ConnType = 'ActiveCNX'

### Find Duplicates in the Attribute Log

```
SELECT Attributeid, Roomid, convert(nvarchar(19), LogTimeStamp, 121) LTS, count(*)
iCNT
FROM CRV_AttributeLog
group by Attributeid, Roomid, convert(nvarchar(19), LogTimeStamp, 121)
having count(*) > 1
```

### Find Duplicates in the Usage Log

SELECT roomid, datatype, data1, data2, data3, convert(varchar(19), logtimestamp, 121) lts, count(\*) iCNT FROM CRV\_UsageLog Group By roomid, datatype, data1, data2, data3, convert(varchar(19), logtimestamp, 121) having count(\*) > 1

### **Attribute History**

```
SELECT r.RoomName, a.AttributeName, al.LogTimeStamp, al.AnalogValue
FROM CRV_AttributeLog al
join CRV_Attributes a on al.AttributeID = a.AttributeID
join CRV_Rooms r on al.RoomID= r.RoomID
WHERE a.AttributeID = 'DISPLAY_USAGE' and r.Roomid ='7c31f850-9f14-49ec-b79c-
ded7fa77d11f' order by al.LogTimeStamp, r.RoomID desc
```

# Glossary

#### Ad Hoc

Ad Hoc is a meeting typically made anonymously from a scheduling panel. "Reserve Now" meetings are an example of an Ad Hoc meeting.

#### Attributes

In Crestron Fusion, an attribute represents a digital, analog, or serial signal in the program running on a processor.

#### Bookable rooms

Bookable rooms are rooms with calendars that are shared resources, available to anyone to reserve for meetings.

#### Non-bookable rooms

Non-bookable rooms include common areas such as hallways and bathrooms, offices, open office spaces, retail spaces, and datacenters.

#### GUID

GUID stands for "Globally Unique Identifier," used to identify many objects in the Crestron Fusion database.

#### RVI

RVI is a "RoomView Information" file. These files, created when a Crestron program compiles, contain all of the relevant Crestron Fusion information from the corresponding program. Crestron Fusion parses this XML formatted file and builds the corresponding database records.

#### Decline for No Show (D4NS)

D4NS is a native application on Crestron scheduling panels that will free up a room's calendar when a meeting is unattended.

#### **Groupware Provider**

Groupware Provider refers to the system that provides a calendar for the rooms in Crestron Fusion. Examples are Microsoft Exchange Server<sup>®</sup> software, Google Calendar<sup>™</sup> app, IBM Notes<sup>®</sup> software, etc.

#### BI

BI (Business Intelligence) refers to the analysis of data to produce an actionable story that acts as the basis for business decisions.

#### Data shaping

Data shaping is the process of manipulating existing data to bring together diverse datasets in order to produce an overall report.

#### SSI - Single Simple Interface

SSI is a set of attributes (signals) and behaviors that define how to send data to Crestron Fusion software.

#### Visualization

A Visualization is an interactive chart, table or graph that presents data in a report.

#### Filter

Filter is a control in a Power BI or other report that isolates specific data in the visualization.

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