VitalView GOLD

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VitalView GOLD

VitalView GOLD® is a collection of data, processes, and presentation tools that you can use to gather summary information and present it for analytical and trend analyses and decision-making purposes. It includes the ability to create and summarize data on a daily basis for a variety of purposes, and provides the ability to display this gathered information in a dashboard application, as data mapped to a spreadsheet application, and as fixed formatted reports.

It allows you to analyze all activities, accounts, and loans within the bank. You can look at reports from multiple perspectives, allowing you to discover trends or areas that may need more attention. You can drill down through the layers of data to find the information underlying the report findings.

The following three screens comprise VitalView GOLD:

- VitalView Dashboard
- VitalView GOLD Setup
- VitalView Spreadsheet Integration

➡️ **Next topic:** Definitions

Definitions

drill down

To "drill down" means to move from more generalized or summarized data to more specific data. In VitalView GOLD, this means clicking on an item you're interested in to see the underlying data. You can continue clicking until you reach the lowest level of data.

SQL

VitalView GOLD uses the SQL server as a database. Customer data is loaded into a database at the end of each processing day. This data remains static throughout the day and matches the data on the afterhours reports. At the end of each processing day, the previous day's data is replaced with the information from the current processing day.

Tiles
- Pie
- Bar
- Line
- Grid
- Bullet
- Bullet (multi-table)
- Value
- Link

VitalView GOLD Setup

The VitalView GOLD Setup application is the screen that you use to select what data you want to gather into and view from the VitalView GOLD system. It is located in CIM GOLD (Report Warehouse > Reporting Database > VitalView GOLD Setup) and consists of three tabs: Summary Tables, Parameters, and Summary Table Security. An example of this screen is shown below.

VitalView GOLD Setup Screen

➡️ **Next topic:** Summary Tables Tab

⬅️ **Previous topic:** Definitions

Summary Tables Tab

The Summary Tables tab shows the summarized data tables that you can use to gather data to spreadsheets, dashboards, and reports.

Summary Tables Tab

The following table describes the **Summary Tables** list view.

Field	Description
Summary Tables list view	The Summary Tables list view shows all the summary tables available for your institution. You can determine which summary tables you want your institution to use and whether you want to control employee security for each table. The columns on the Summary Tables list view are described below.

	Use	Check the box in this column to indicate that your institution uses the summary table defined in this row for spreadsheets, dashboards, and reporting. Uncheck the box to stop using the table. <table><tr><td>**WARNING** If you uncheck the box after it has been checked, the summary tables will be deleted, and any data you have gathered will be lost.</td></tr></table>
	Summary Table Name	This shows the name of the summary table.
	Secure	Check the box in this column to control which employees can view data in this summary table in spreadsheets, dashboards, and reporting. If this box is not checked, all employees will have full access to the data in this summary table. For more information, see the Summary Table Security Tab.
	Summary Table Description	This is a brief description of the data that is included in the table.

Buttons

The following button is used on the Summary Tables tab.

\<Save\>

If you make changes to the **Summary Tables** list view, none are permanently saved until you click \<Save\>. If you leave the screen after you have made changes without clicking this button, the program will prompt you if you want to save your changes. If you answer "Yes," your changes will be saved.

Next topic: Parameters Tab

Previous topic: VitalView GOLD Setup

Parameters Tab

Parameters are used to group the data that is created daily and stored in the VitalView GOLD summary tables; for example, deposit product groups and loan type groups. By editing the parameters, you control how the data is aggregated—how the data will be split into different lines, bars, or pie sections on the dashboard.

The summary tables are often based on data specific to each institution, such as loan types, G/L accounts, and other codes. In order to summarize data specifically to the needs of the institution, parameter tables are set up with institution-specific values. Each summary table can use one or more parameters to help organize its data. To access parameters, highlight a specific summary table on the Summary Tables tab, then click the Parameters tab heading. The parameters for that summary table will be displayed in the **Parameter Name** list view.

In the example below, the DepositSummary summary table was selected. These are the parameters associated with that summary table.

Parameters Tab

The items on the top portion of the screen are described in the following table:

Field	Description
Parameter Name list view	This list view displays each parameter used by the selected summary table. Clicking on one of the parameter names displays its detail in the lower portion of the screen.
Show default settings	Check this checkbox to display the default settings. This is for Editor users only.
Work folder	Processing parameters requires temporary work space. You can select a folder for the program to use by entering the path in this field. You can click <Browse> to display a dialog that allows you to select a temporary work folder path. If you leave this field blank, the program will use a system temporary folder.

As noted, the top portion of the Parameters tab page displays a list of the parameters used by the selected summary table. Selecting one of the parameters displays its detail setup on the lower portion of the screen.

The lower portion of the screen varies based on the type of the parameter.

Following is an example of the Deposit Account Feature parameter.

Lower Portion of Parameters Tab

Buttons
The following buttons are used on either most or all of the parameters. Buttons unique to a particular parameter will be discussed with the description of that parameter.

<Add New Group>
To start a new group, enter the name of the group in the Active Group text box and then click <Add New Group>. This will verify that the group name is not empty and that the new group name does not already exist. When the group is added, it is automatically selected to be the active group.

<Clear Active Group>
Clicking this button deselects any groups selected in the Group list view on the left, then clears and enables input to the Active Group text box.

<Delete Group(s)>
Clicking this button will delete all highlighted groups.

<Rename Active Group>
To correct spelling or just to change a group name, select the group to be the active group and then click this button. Another small window will come up and show the current group name and let you enter the new name. Clicking <OK> causes the group to be renamed. You cannot change its name to a name that is already on file.

<Search>
Click <Search> after changing search text and checkboxes to redisplay entries that match the search criteria.

<Save>
When you make changes on the screen, none of them are permanently saved until you click <Save>. If you leave the screen after you have made changes without clicking this button, the program will ask you if you want to save your changes. If you answer "Yes," your changes will be saved.

The Deposit Account Feature parameter is an example of a generic parameter. There are six types of parameters used in VitalView GOLD:

- Generic
- GrpByDepProd (group by deposit product)
- GrpByLnClass (group by loan class)
- GrpByLnType (group by loan type)
- GLAcctList (group by G/L account)

- [TimePeriod (group by user's choice of hour/30 min/15 min intervals)](#)

⇨ **Next topic:** [Generic Parameters](#)

⇦ **Previous topic:** [Summary Tables Tab](#)

Generic Parameters

The example below illustrates a generic parameter table list view. Generic parameters have a very specific table format and allow very little editing. A row of fields above the list view is used to add and edit row data. Click on a parameter in the list view to display it for editing. If you make changes to the data in the list view, the data is not permanently saved until you click the <Save All Rows> button.

Summary Tables	**Parameters**	Summary Table Security

Parameter Name
DepositAccountFeature
DepositGeneralCategory
GroupByDepProduct

☐ Show default settings (Editor users only!)

Work folder C:\Users\kentc\AppData\Local\Temp\ [Browse]

Deposit General Category General Category Code

[Delete Row] [Clear Fields] [Update Row] [Add Row] ○ Show Name ● Show Description **Displaying defaults** [Save All Rows]

Deposit General Category	General Category Code	
Transaction Account	1	
Time Deposit	2	
Public Funds	3	
Retirement Account	4	
Regular Savings	5	
MMDA Account	6	
Telephone Funds/CDT	7	
NOW	8	
Non-Interest Bearing	9	
Super NOW	10	
Jumbo	11	
Uninsured Borrowings	12	
Brokered Account	13	

The fields in the lower portion of the screen are described below. (The fields in the upper portion of the screen are described in the [Parameters Tab](#).)

Field	Description
Show Name and **Show Description** radio buttons	Each field has a field name and a field description. If you would rather view fields by their longer description than their shorter name, click the **Show Description** radio button. Clicking **Show Name** will go back to displaying field names.

Field	Description
Displaying defaults	Some generic parameters have system default parameters set up if many institutions will be able to use some common parameters. If the text "Displaying defaults" is displayed in a yellow background just to the left of the <Save All Rows> button (as in the example above), the text displayed on the screen is the default data. If you change the data and then save it, the default data with your changes added to it will be saved for your institution. The next time the data is displayed, you will not see the "Displaying defaults" message.
Parameter Table list view	The **Parameter Table** list view displays all the fields that are part of the parameter that you selected in the **Parameter Name** list view above. If you want to edit a field, click on the field and the data will be displayed in the edit fields above this list view.
Edit fields	The row of fields above the **Parameter Table** list view is used for editing existing parameter fields and for adding new parameter fields.

Buttons
The following buttons are used with the **Parameter Table** list view.

<Delete Row>
Highlight rows in the parameter table that you want to remove, then click <Delete Row> to remove them.

<Clear Fields>
Click <Clear Fields> to deselect any selected rows in the list view and clear all the edit fields above the list view.

<Update Row>
Clicking a row in the list view displays the row data in the fields above the screen. To change the data, type the new values into the fields, then click <Update Row>. The changes will be displayed in the list view row.

<Add Row>
To add a new row to the parameter table, fill in all the edit fields with the desired values, then click <Add Row>. The new row will be added to the list view.

<Save All Rows>
Click <Save All Rows> to save all the changes you have made to the database. Changes made in the parameter table will not be saved until this button is clicked. If you leave the screen without saving changes, you will be asked if you want to save your changes. If you click <Yes>, your changes will be saved.

Deposit Product Grouping

Below is an example of the Deposit Product Group parameter—a summarized group parameter. In this case, you are summarizing like products into a single total group. For example, you might combine all the different kinds of checking products into the single group "Checking."

All summarized groups can have different data types they are summarizing, but they will also function in the same manner as does this example:

The fields in the lower portion of the screen are described below. (The fields in the upper portion of the screen are described in the Parameters Tab.)

Field	Description
Group Descriptions list view	The list view on the left shows the groups you have defined. Selecting one of these groups makes it the active group. The codes belonging to the active group will be highlighted in yellow in the **Code and Descriptions** list view.
Code and Descriptions list view	The list view on the right shows each valid code and description of the type being processed. In this example, the list view shows product codes and product code descriptions. If you right-click a row in the **Code and Descriptions** list view and select the Activate Group menu item, the parent group of the selected row will be selected to be the active group.
Active Deposit Product Group text box	When a group is selected, the active group is listed here and the box is protected. If no active group is selected, you can type the name of the new group here, then click <Add New Group> to add the group.
Selection Criteria field group	The checkboxes and buttons in this field group control what is displayed in the **Code and Descriptions** list view on the right side of the screen.

Field	Description
Description matches checkbox	When this is checked, only those items that contain the text in the text box to the right will be displayed when <Search> is clicked. If this is not checked, the search does not match text in the text box.
Entries in active group checkbox	When this is checked, entries that are in the active group are displayed when <Search> is clicked.
Used entries not in active group checkbox	When this is checked, entries that are assigned to a group but not to the active group are displayed when <Search> is clicked.
Entries not used checkbox	When this is checked, entries that have not been assigned to any group are displayed. **NOTE** For the three entries checkboxes above, if none of them are checked, all items are displayed. If you want all of them, you could check all three boxes or none of the three boxes and get the same result..
Color Key field group	The color key is for convenience only and has no associated action. It shows that the background color of rows not assigned to any group are white, rows assigned to a group but not to the active group are lavender, and rows assigned to the active group are yellow.

Buttons

The following buttons are used with the Deposit Product Group parameter.

Apply selected entries to Active Group

To assign codes to a group, first select an active group and then select a row or rows in the **Code and Descriptions** list view that you want to assign to the active group. Click <Apply selected entries to Active Group> to complete the assignment. You can assign codes to a new group using this process. For each code that has been previously assigned to another group, the program will ask if you are sure you want to change the assignment.

Remove selected from Active Group

To remove codes from an active group, first select and active group and then select the row or rows that you want to take out of the group. Click <Remove selected from Active Group> to remove the assignment. If you select rows that are not part of the active group, they will be ignored and their status will not change.

For a description of the buttons used with the Deposit Product Group parameter, see Parameters Tab.

➡ **Next topic:** Loan Class Grouping

⬅ **Previous topic:** Generic Parameters

Loan Class Grouping

Below is an example of the Loan Class Group parameter—a summarized group parameter. In this case, you are summarizing like products into a single total group. For example, you might combine all the different kinds of checking products into the single group "Checking."

All summarized groups can have different data types they are summarizing, but they will also function in the same manner as does this example:

Loan Class Grouping

The fields in the lower portion of the screen are described below. (The fields in the upper portion of the screen are described in the Parameters Tab.)

Field	Description
Group Descriptions list view	The list view on the left shows the groups you have defined. Selecting one of these groups makes it the active group. The codes belonging to the active group will be highlighted in yellow in the **Code and Descriptions** list view.
Code and Descriptions list view	The list view on the right shows each valid code and description of the type being processed. In this example, the list view shows product codes and product code descriptions. If you right-click a row in the **Code and Descriptions** list view and select the Activate Group menu item, the parent group of the selected row will be selected to be the active group.

Field	Description
Active Loan Class Group text box	When a group is selected, the active group is listed here and the box is protected. If no active group is selected, you can type the name of the new group here, then click <Add New Group> to add the group.
Selection Criteria field group	The checkboxes and buttons in this field group control what is displayed in the **Code and Descriptions** list view on the right side of the screen.
Description matches checkbox	When this is checked, only those items that contain the text in the text box to the right will be displayed when <Search> is clicked. If this is not checked, the search does not match text in the text box.
Entries in active group checkbox	When this is checked, entries that are in the active group are displayed when <Search> is clicked.
Used entries not in active group checkbox	When this is checked, entries that are assigned to a group but not to the active group are displayed when <Search> is clicked.
Entries not used checkbox	When this is checked, entries that have not been assigned to any group are displayed. **NOTE** For the three entries checkboxes above, if none of them are checked, all items are displayed. If you want all of them, you could check all three boxes or none of the three boxes and get the same result.
Color Key field group	The color key is for convenience only and has no associated action. It shows that the background color of rows not assigned to any group are white, rows assigned to a group but not to the active group are lavender, and rows assigned to the active group are yellow.

Buttons
The following buttons are used with the Loan Class Group parameter.

Apply selected entries to Active Group
To assign codes to a group, first select an active group and then select a row or rows in the **Code and Descriptions** list view that you want to assign to the active group. Click <Apply selected entries to Active Group> to complete the assignment. You can assign codes to a new group using this process. For each code that has been previously assigned to another group, the program will ask if you are sure you want to change the assignment.

Remove selected from Active Group
To remove codes from an active group, first select and active group and then select the row or rows that you want to take out of the group. Click <Remove selected from Active Group> to remove the assignment. If you select rows that are not part of the active group, they will be ignored and their status will not change.

For a description of the buttons used with the Loan Class Group parameter, see Parameters Tab.

➡️ **Next topic:** Loan Type Grouping

⬅️ **Previous topic:** Deposit Product Grouping

Loan Type Grouping

Below is an example of the Loan Class Group parameter.

Loan Type Grouping

The fields in the lower portion of the screen are described below. (The fields in the upper portion of the screen are described in the Parameters Tab.)

Field	Description
Group Descriptions list view	The list view on the left shows the groups you have defined. Selecting one of these groups makes it the active group. The codes belonging to the active group will be highlighted in yellow in the **Code and Descriptions** list view.
Code and Descriptions list view	The list view on the right shows each valid code and description of the type being processed. In this example, the list view shows product codes and product code descriptions. If you right-click a row in the **Code and Descriptions** list view and select

Field	Description
	the Activate Group menu item, the parent group of the selected row will be selected to be the active group.
Active Loan Type Group text box	When a group is selected, the active group is listed here and the box is protected. If no active group is selected, you can type the name of the new group here, then click <Add New Group> to add the group.
Selection Criteria field group	The checkboxes and buttons in this field group control what is displayed in the **Code and Descriptions** list view on the right side of the screen.
Description matches checkbox	When this is checked, only those items that contain the text in the text box to the right will be displayed when <Search> is clicked. If this is not checked, the search does not match text in the text box.
Entries in active group checkbox	When this is checked, entries that are in the active group are displayed when <Search> is clicked.
Used entries not in active group checkbox	When this is checked, entries that are assigned to a group but not to the active group are displayed when <Search> is clicked.
Entries not used checkbox	When this is checked, entries that have not been assigned to any group are displayed. **Note:** For the three entries checkboxes above, if none of them are checked, all items are displayed. If you want all of them, you could check all three boxes or none of the three boxes and get the same result.
Color Key field group	The color key is for convenience only and has no associated action. It shows that the background color of rows not assigned to any group are white, rows assigned to a group but not to the active group are lavender, and rows assigned to the active group are yellow.

Buttons
The following buttons are used with the Loan Type Group parameter.

Apply selected entries to Active Group
To assign codes to a group, first select an active group and then select a row or rows in the **Code and Descriptions** list view that you want to assign to the active group. Click <Apply selected entries to Active Group> to complete the assignment. You can assign codes to a new group using this process. For each code that has been previously assigned to another group, the program will ask if you are sure you want to change the assignment.

Remove selected from Active Group
To remove codes from an active group, first select and active group and then select the row or rows that you want to take out of the group. Click <Remove selected from Active Group> to remove the assignment. If you select rows that are not part of the active group, they will be ignored and their status will not change.

The fields in the lower portion of the screen are described below. (The fields in the upper portion of the screen are described in the Parameters Tab.)

General Ledger Account Grouping Parameters

The General Ledger account grouping parameters are similar to the regular grouping parameters listed above except that you are allowed to group at several levels. Accounts are summarized into groups. Groups are summarized into level 1 subtotals, which in turn are summarized into level 2 subtotals, and so on. The highest supported level is level 4. An example to illustrate this would be:

Total Assets (level 4 subtotal)

  Total Net Loans (level 3 subtotal)

    Gross Loans (level 2 subtotal)
      Net Mortgage Loans (level 1 subtotal)
        Mortgage Loans (group)
          Branch 1 Mortgages (account)
          Branch 2 Mortgages (account)
        Construction Loans (group)

          Branch 1 Construction Loans (account)

          Branch 2 Construction Loans (account)
      Home Equity Loans (level 3 subtotal)
        Home Equity Loans (group)
          Branch 1 Home Equity Loans (account)
          Branch 2 Home Equity Loans (account)
    Valuation Allowances (level 2 subtotal)
      Valuation Allowances (level 1 subtotal)
        Valuations Allowances (group)

          Branch 1 Valuation Allowances (account)

          Branch 2 Valuation Allowances (account)
  Other Assets (level 3 subtotal)
    Other Assets (level 2 subtotal)
      Office Properties and Equipment (level 1 subtotal)
        Branch 1 Office Properties and Equipment (group)
          Branch 1 Properties (account)
          Branch 1 Equipment (account)
        Branch 2 Office Properties and Equipment (group)
          Branch 2 Properties (account)
          Branch 2 Equipment (account)

The General Ledger Account Grouping screen has all of the features of the other grouping screens, but additionally includes the capability to view the grouping as a tree and to switch grouping levels. It also includes additional searching capabilities to allow searching by General Ledger account number parts and General Ledger major class settings.

A sample screen follows:

General Ledger Account Grouping

Field	Description
GL Account Group Descriptions list view	The list view on the left shows the groups or level sub-totals you have defined. Selecting one of these rows makes it the active item. The accounts or totals belonging to the active group will be highlighted in yellow in the **Accounts or Subtotal** list view.
Accounts or Subtotal list view	The list view on the right shows each valid account and description or subtotal description that can be assigned to items in the **GL Account Group Descriptions** list view on the left. In this example, the list view shows General Ledger account numbers and descriptions. If you right-click a row in the **Accounts or Subtotal** list view and select the Activate Group menu item, the parent group of the selected row will be selected to be the active group.
Displaying defaults	Some parameters have system default parameters set up if many institutions will be able to use some common parameters.

Field	Description
	If the text "Displaying defaults" is displayed in a yellow background just to the left of the <Save All Rows> button (as in the example above), the text displayed on the screen is the default data. If you change the data and then save it, the default data with your changes added to it will be saved for your institution. The next time the data is displayed, you will not see the "Displaying defaults" message.
Active G/L Account Group text box	When a group or total is selected from the **GL Account Group Descriptions** list view, the active group or total name is listed here and the box is protected. If no active item is selected, you can type the name of a new group or total here, then click <Add New Group> to add the group.
Color Key field group	The color key is for convenience only and has no associated action. It shows that the background color of rows not assigned to any group are white, rows assigned to a group but not to the active group are lavender, and rows assigned to the active group are yellow.

Buttons

The following buttons are used with the General Ledger Account Group parameter.

<Add GL Account Group>

To start a new item, enter the name of the item in the Active text box, then click <Add>. This will verify that the item name is not empty and that the new item name does not already exist. When the item is added, it is automatically selected to be the active item.

NOTE

When you add a new group or level, new sub-totals of the same name are added for each higher level. For example, if you add a new group named "Mortgage Loans," those accounts would be totaled in this group. A new level 1 total could be created called "Net Mortgage Loans" and the "Mortgage Loans" group will be linked to the "Net Mortgage Loans" level 1 total. Then a "Gross Loans" could be added as a level 2 total, and the Net Mortgage Loans" level 1 total could be linked to this level 2 total. And so on through levels 3 and 4 totals. You can subsequently attach any of these totals to another total. When you click <Save>, only tree paths that have valid General Ledger accounts at the bottom of the link path are saved. All paths that do not have accounts linked to them are removed from the tree as part of the save process.

<Define GL acct groups>

This button is used to select which level of totals you are grouping. The original setting is to combine General Ledger accounts to groups. Select the totals that you want to appear in the **GL Account Group Descriptions** list view. When you do so, the appropriate totals or accounts that can be assigned to the left-side items will appear in the right-side list view. For example, if you select "Define GL acct groups," the account groups will display on the left side and accounts will display on the right. If you select "Define level 1 subtots," the level 1 sub-totals will appear on the left side and the account groups will display on the right.

<Create Group(s) for Selected Account(s)>

This button is used to quickly create new G/L Groups for individual General Ledger accounts. While on the "Define GL Acct Groups" level, you can highlight the account(s) you want to create a group for, then once this button is clicked, the system will create an individual group for each G/L account that was selected. When G/L accounts are selected in the Accounts list view, you also have the option to right click and then select "Create Group(s) for Selected Account(s)". When using either of these options, the system will create a new GL Group and name the group using the account number and title from the GL Account that was selected

Displaying defaults

Some parameters may have system default parameters. If the black text, "Displaying defaults," in a yellow background appears just to the left of the screen below the <Delete> button, the data displayed on the screen is the default data. If you change the data and then save it, the default data with your changes added to it will be saved for your institution. The next time the data is displayed, you will not see the "Displaying defaults" message.

- Chart of Accounts Selection Criteria field group – the checkboxes and buttons in this field group control what is displayed in the right-hand list view.
  - Title matches checkbox – when this is checked, only those items that contain the text in the text box to the right will be displayed when you click <Search>. If this is unchecked, the search does not match text in the text box.
  - Acct matches checkbox – when this is checked, accounts that match to the General Ledger to the right are displayed when you click <Search>. The General Ledger number to the right has boxes for each of the subfields of the General Ledger account number. Only those subfields that have text in them enter into the match. For example, if you want to display account 4544 for all branches, enter "4544" in the account subfield and leave all other subfields blank. If you want to see all branch 10 accounts, enter "10" in the branch subfield and leave all others blank.
  - Major class is checkbox – when this is checked, only accounts that have the major class that is selected in the drop list to the right of this checkbox are displayed when you click <Search>.
  - Active items checkbox – when this is checked, entries that are in the active item are displayed when you click <Search>.
  - Used but not active items checkbox – when this is checked entries that are assigned to an item but not to the active item group are displayed when you click <Search>.
  - Items not assigned checkbox – when this is checked, entries that have not been assigned to any item are displayed.
  - **Note:** For the three items checkboxes above, if none of them are checked, all items are displayed. If you want all of them you could check all three boxes or none of the three boxes and get the same result.
  - <Search> button – click <Search> after changing search text and checkboxes to redisplay entries that match the search criteria.

<Apply to active>

To assign accounts to a group or totals to a higher level total, first select an active item and then select a row or rows in the right-hand list view that you want to assign to the active item. Click <Apply> to complete the assignment. You can assign items to a new item using this process. For each item that has been previously assigned to another item (not the active item), the program will ask if you are sure you want to change the assignment.

<Remove from active>

To remove groups or totals from an active item, first select an active item and then select the row or rows that you want to take out of the active item. Click <Remove> to remove the assignment. If you select rows that are not part of the active item, they will be ignored and their status will not change.

<Save>

When you make changes on the screen, none of them are permanently saved till you click this button. Clicking this button saves all changes for all groups and totals at all levels. If you leave the screen after you have made changes without clicking this button, the program will ask you if you want to save your changes. If you click <Yes>, your changes will be saved.

➡ **Next topic:**

⬅ **Previous topic:** Loan Type Grouping

Time Period Parameters

Some summary tables allow you to summarize by time periods. For example, you can summarize teller transactions into half-hour intervals of the day to view when transactions are processed over a period of time. The time parameters always have three fields: **Period Name**, **Start Time**, and **End Time**. The screen provides some help for you so you don't have to enter every single time period manually.

Like the other parameter types, the time period parameter has the capability to display default parameters. If the text "Displaying defaults" is displayed in a yellow background just to the left of the <Save All Rows> button (as in the example above), the text displayed on the screen is the default data.

If you change the data and then save it, the default data with your changes added to it will be saved for your institution. The next time the data is displayed, you will not see the "Displaying defaults" message.

The screen appears as follows:

Time Period Parameters

Column	Description
Period Name column	The period name can be any name you want to give it. When the system automatically chooses the name, the name is the beginning of the time period, such as "AM 06:00," as seen above.
Start Time column	This is the period start time in 24-hour format. The start time is included within the period.
End Time column	This is the period ending time in 24-hour format. The end time is included within the period.
Automatically Populate the Time Period Grid field group	Items in this field group are used to tell the program how to automatically build the time periods.
Set up time periods for every	Enter the number of minutes or hours you want to be included in each time period, then select the appropriate **Hours** or **Minutes** radio button.
Beginning at	Select the beginning of the first time period.
Ending at	Select the ending of the last time period.
Name Style	Select **AM/PM** if you want your time listed in 12-hour times with AM or PM. Select **Military** if you want times listed in 24-hour format.
Include time period entries for	Check this box if you want to add additional time periods for the times before the beginning time and after the ending time.

Column	Description
times not specified checkbox	
Manually Add or Edit Time Periods field group	Items in this field group are used to modify time period settings after they have been automatically calculated or manually entered. To edit an existing time period, select the period in the list view. When it is selected, it will fill in the **Period Name**, **Start Time**, and **End Time** fields of the field group. Make the appropriate changes as needed, then click <Update> To delete time periods, select the time periods to delete in the list view, then click <Remove>. Click <Clear> to deselect selected time periods and to clear the fields in the field group. To add a new time period, enter the desired **Period Name**, **Start Time**, and **End Time** fields, then click <Update>.

Buttons

The following buttons are used with time period parameters.

<Populate>

Clicking <Populate> will delete all current time periods and calculate new time periods following the instructions supplied by the options in the Automatically Populate the Time Period Grid field group.

<Save Time Periods>

Changes to the time period list view are saved to the database when you click this button. If you leave the screen without clicking the button, you will be asked if you want to save your changes. If you click <Yes>, your changes will be saved.

➡ **Next topic:**

⬅ **Previous topic:**

Summary Table Security Tab

Your institution may want to limit which employees can access certain summary tables. This tab is used to control which employees can view the summary tables that have the Secure column checked in the Summary Tables tab.

You can choose to assign security by summary table or by employee. If you select the **Summary table** radio button, the summary tables will be displayed in the left-side list view and the employees in the right-side list view. In this case, you would select a summary table, then check each employee in the right-side list view that you want to have access to that summary table and uncheck the ones you don't want to have access.

If you select the in the right-side list view radio button, all the employees are listed in the left-side list view, and the summary tables are listed in the right-side list view. In this case, you would select an employee, then in the right-side list view you would check all the summary tables that you want that employee to have access to and uncheck the ones you don't want the employee to have access to.

An example of assigning security by summary table and by employee are both shown below.

Assigning Security by Summary Table

Assigning Security by Employee

The following table describes fields on the Summary Tables tab.

Column	Description
Assign security by field group	The list view in this field group shows either the summary tables or the employees that can have items assigned to them. When a row is selected, the right-side list view shows

Column	Description
	which items have been assigned to it (the boxes are checked). Changing the selection in the left side changes the selection on the right. Each time a change is made, the program remembers the settings as they were before the change.
Summary table radio button	When this is checked the left-side list view shows summary tables, and assignments are made as to which employees can view data in a specific summary table.
Employee radio button	When this is checked the left-side list view shows employees, and assignments are made as to which summary tables and employee can view.
Security Settings field group	The list view in this field group shows either employees or summary tables that can be accessed by the single summary table or employee selected from the left-side list view. When the box is checked, access is allowed; when unchecked, access is not allowed.
Check or Uncheck All checkbox	Checking this checkbox will check all checkboxes in the list view. Unchecking this checkbox will uncheck all checkboxes in the list view.

Buttons
The following buttons are used with the Summary Table Security tab.

<Copy Last Setting>
Each time a setting changes, the program remembers the setting as it was before the change. Clicking this button will set the current setting to the setting as it was before the last change. This is used to easily make one employee or one summary table have the same settings as another.

<Save All Settings>
Clicking this button saves all changes you have made to the database. If you leave this screen after making changes without clicking <Save>, you will be asked if you want to save your changes. If you click <Yes>, your changes will be saved.

➡️ **Next topic:** VitalView Dashboard Screen

⬅️ **Previous topic:** Time Period Parameters

VitalView Dashboard

VitalView dashboards are used to view aggregates—totals, weighted rates, averages, counts, etc. Millions of these aggregate values are calculated and stored in the SQL database every night. Dashboards are constructed with a variety of tiles. Some tiles, such as pie charts and bar charts, are used to display aggregates for a single day. Other tiles, such as line charts and sparklines, are used to display trends occurring over a period of time.

VitalView dashboards are accessed through Report Warehouse > Reporting Database > VitalView Dashboard in CIM GOLD. Multiple dashboards can be created, saved, and recalled.

Below is an example of a VitalView dashboard.
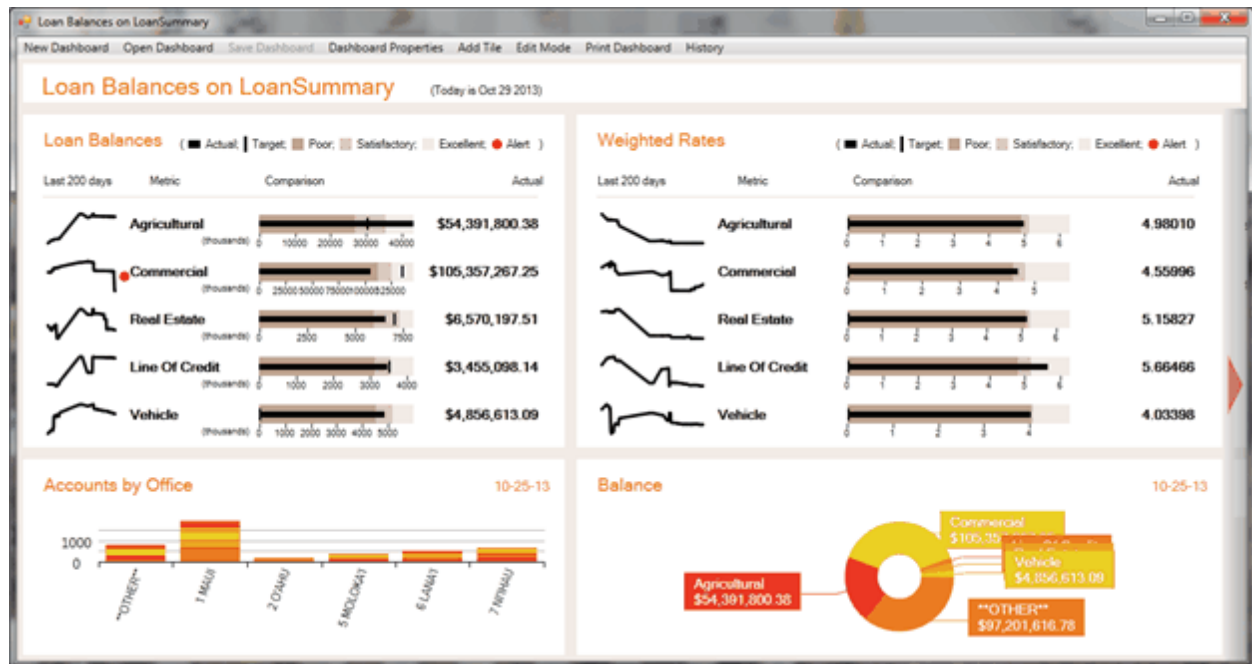
VitalView Dashboard Screen

When you open the VitalView Dashboard screen, your home dashboard will automatically be displayed. If you do not yet have a home dashboard, a screen similar to the following will be displayed.
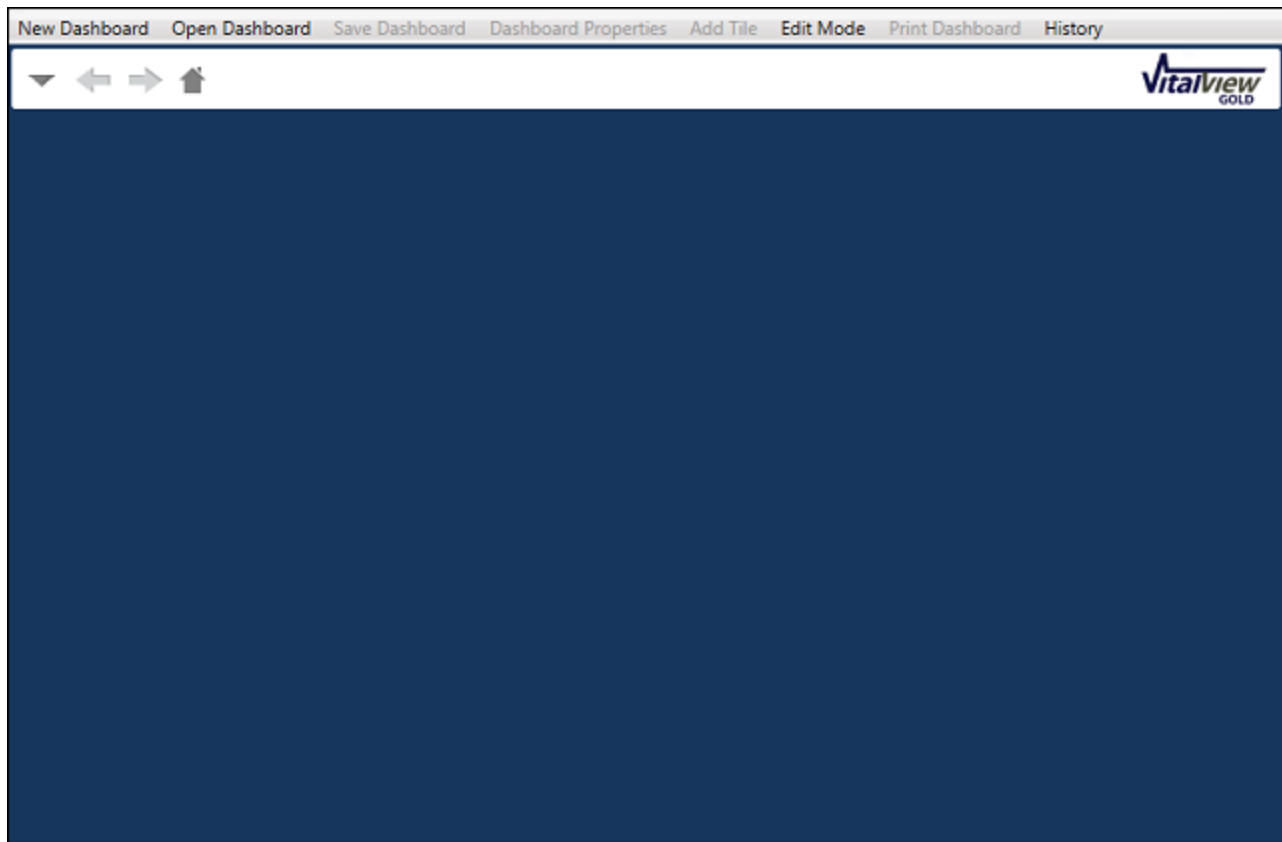
VitalView Dashboard Screen

Explanations for the menu items can be found at the following links:

- **New Dashboard**
- **Open Dashboard**
- **Save Dashboard**
- **Dashboard Properties**
- **Add Tile**
- **Edit Mode**
- **Print Dashboard**
- **History**

Next topic: Initial View

Previous topic: Summary Table Security Tab

Initial View

The first dashboard displayed in CIM GOLD will always be your "home" dashboard. You can then click on "Open Dashboard" on the menu to display the Open dialog (see example below). From this dialog, you can choose a different dashboard to view.

There are two types of dashboard—shared and personal. Shared dashboards can be viewed and modified by others. Only the owner of a personal dashboard can view or modify that dashboard. Dashboards can be copied from personal to shared and vice versa using the Open dialog.

Sample dashboards are also provided on the Open dialog. These dashboards pull a variety of different information and analyze it in ways that you may find useful. You can copy a sample dashboard to the Shared Dashboards or Personal Dashboards list views and then change it as you would a dashboard that you created yourself. However, only editor users have the ability to add, modify, or delete sample dashboards.

Open, Copy, Paste, and Delete Dashboards

Shared Dashboards

Number	Title	Category	Created	Created By	Changed	Changed By
000058	Balance by Loan Group		2013-07-11 09:24:27	FSCOTT	2014-08-05 10:56:31	APRILY
000059	Vehicle Loan Delinquency (click on line graph to select date for pie)		2013-07-12 10:50:57	FSCOTT	2014-11-13 15:10:01	FSCOTT
000063	new teller summary with element detail		2013-08-02 06:59:54	fscott	2014-06-30 15:46:56	APRILS
000065	Loan Balances on LoanSummary	Loans	2013-08-08 17:53:39	FSCOTT	2014-11-17 18:25:05	RALEIGHK
000066	Deposits	DepositSummary	2013-08-09 12:39:13	FSCOTT	2015-05-08 12:07:55	APRILY

Copy   Paste   Delete   Open

Personal Dashboards

Number	Title	Category	Created	Created By	Changed	Changed By
000534	ACH Details	Sample - Operations	2016-04-26 15:13:52	TIBENTLEY	2016-09-12 13:57:03	KENTC

Copy   Paste   Delete   Open

Sample Dashboards

Number	Title	Category	Created	Created By	Changed	Changed By
000484	Loan Class Analysis	sample	2014-06-13 11:43:18	FSCOTT	2016-03-30 16:01:35	FSCOTT
000508	Total Loan Delinquency	Sample - Lending	2015-01-21 10:29:44	ROBERT	2016-07-13 08:53:48	TIBENTLEY
000510	Loan Servicing	Sample - Lending	2014-08-22 12:52:18	JENNIFER	2016-07-13 08:54:10	TIBENTLEY
000511	New Customer Details	Sample Operations	2016-04-28 16:28:35	TIBENTLEY	2016-07-27 13:01:37	ROBERTG
000512	Branch Staffing Utilization	Sample - Operations	2014-06-13 11:46:30	FSCOTT	2016-07-27 13:01:42	ROBERTG

Copy   Paste   Delete   Open

Open Dashboard Dialog

Security

Users with inquiry only access to the dashboard CIM GOLD screen will not be able to modify dashboards. Additionally, the SQL tables where aggregate data is stored can be secured. Once secured, only users who are given security to a secured SQL table will be allowed to view dashboards that display data from that SQL table.

If you have file maintenance access, the Edit Mode menu item will be displayed. You can use this menu item to toggle back and forth between "File Maintenance" and "Inquiry Only."

Next topic: Using an Existing Dashboard

Previous topic: Initial View

Using an Existing Dashboard

In addition to displaying aggregate data, dashboards provide a range of functionality. Users with file maintenance access can switch to inquiry only mode if they want to use the dashboard's functionality without accidentally modifying it.

Tool tips
If you hover over any data point, whether it is a pie slice, bar, line, sparkline, bullet graph, or single value, a tool tip with additional information about that point will be displayed.
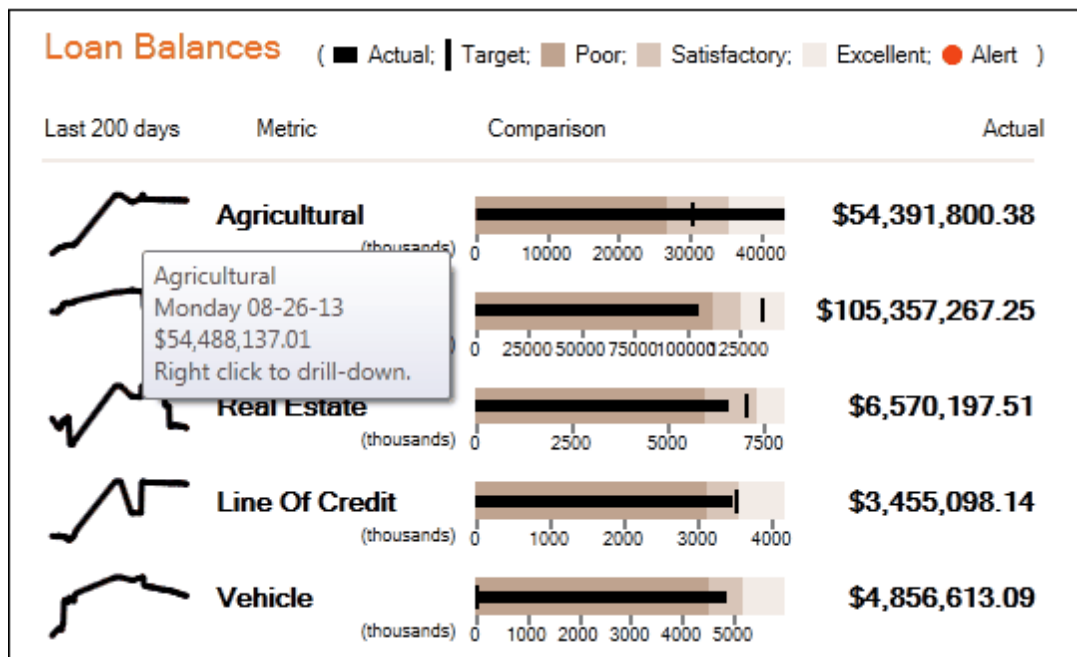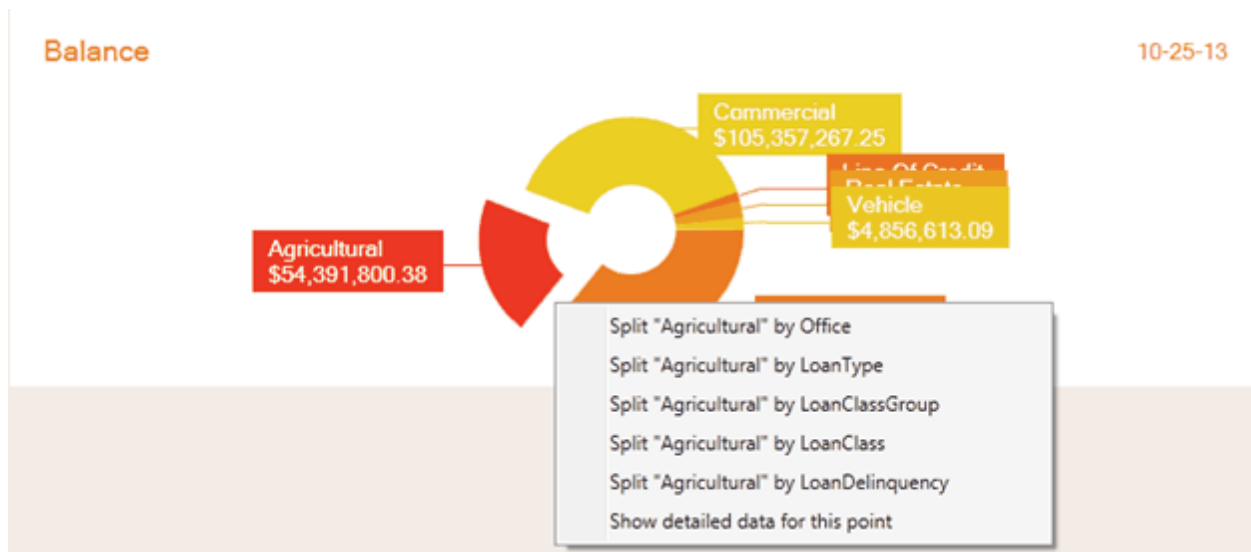

Left-click
Left-clicking on a data point within a sparkline or line chart will cause a vertical date selection line to be displayed on that chart and on all other sparklines and line charts. Additionally, all tiles that display aggregate data for a single day—for example, bar charts, pie charts, single values, and bullet graphs—will be updated to display data for the selected date. Left-clicking on another data point will select a new date, and left-clicking on the vertical date selection line itself will remove the date selection.
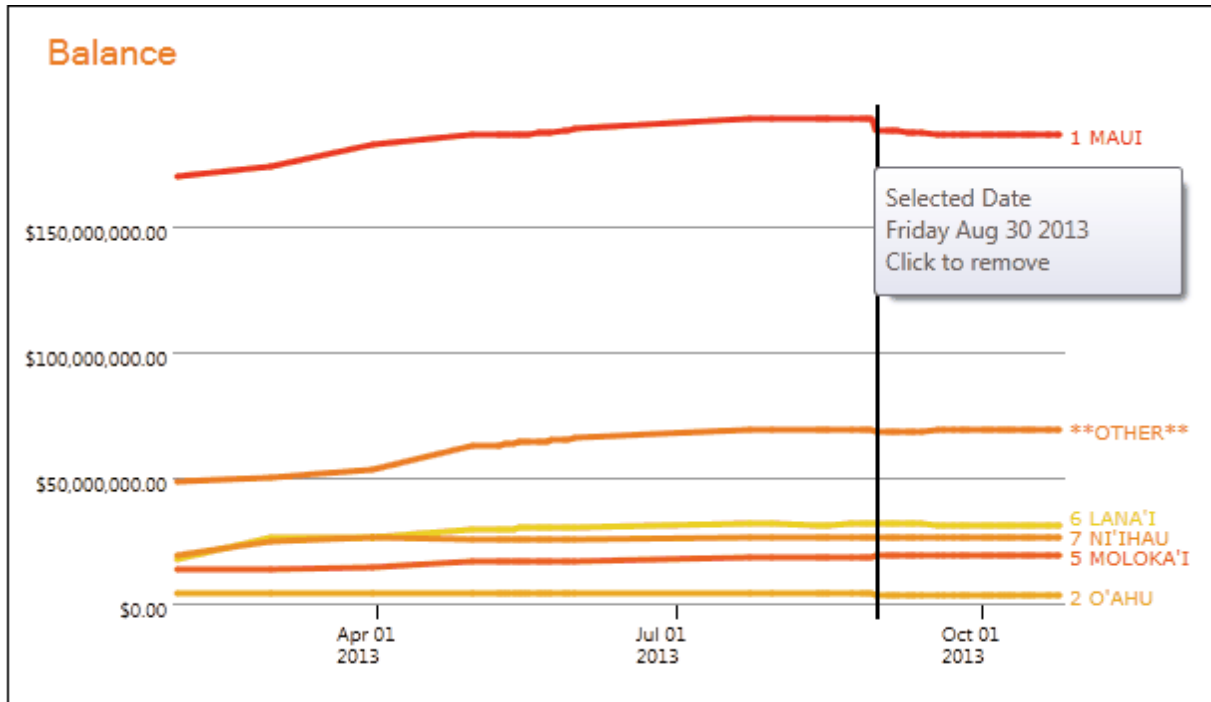
Right-click for detailed data

Right-click on a data point to display a menu from which you can choose to display detailed data for the current data point. This will be all rows (records) that were aggregated to create the data point. For instance, if the data point is total agricultural loan balance for October 25, 2013, then the detailed data will be all the agricultural loan accounts that went into that total, including account numbers and balances as of October 25, 2013. Right-clicking on one of these detailed data rows gives you the option of jumping to a detail screen in CIM GOLD. In this instance, you would have the option of going to the loan detail screen in CIM GOLD.
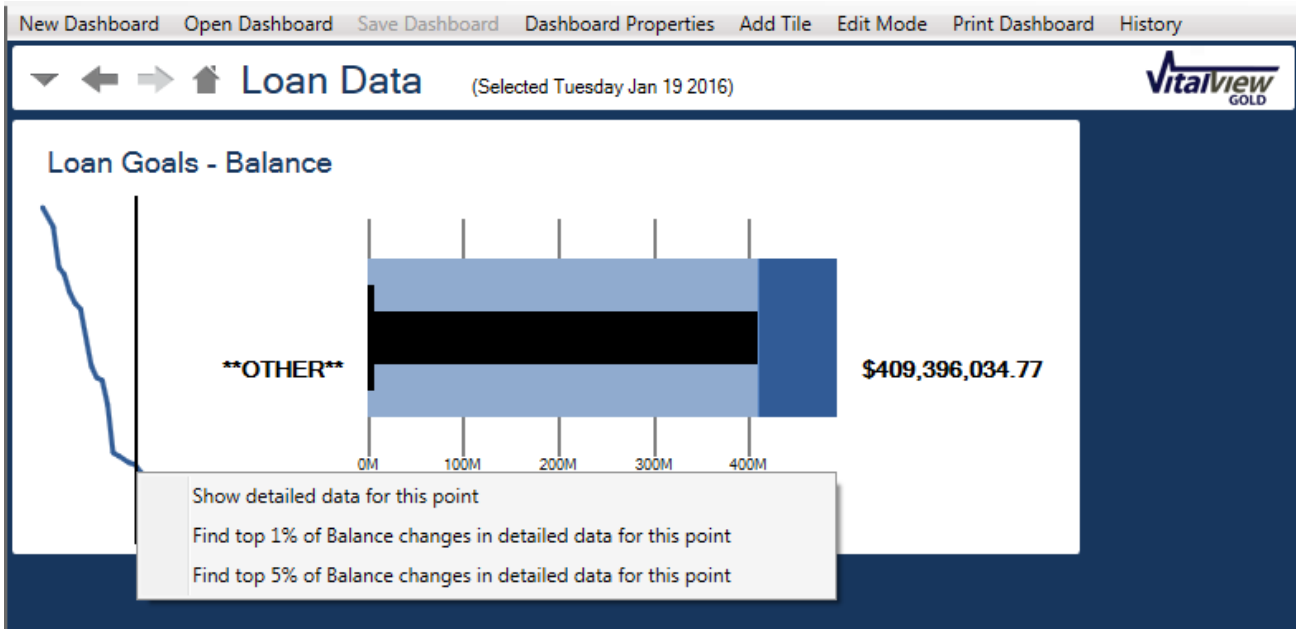
Sometimes a line graph suddenly dips or spikes. You may want to know which accounts contributed most to the spike. When you right-click on a data point, you have the option to see the top 1% or top 5% of changes in detailed data for the data point.

In the examples below, the first shows the message when you right-click on a data point, and the second shows what is displayed if you select the 1% option.

Right-click for further breakdown

Another option on the right-click menu for a data point is an additional split. The split will be displayed in a pop-out window using the same tile type as the tile that was clicked on. So, for instance, you might have a bar chart displaying total balance for checking, savings, and certificate accounts. Right-clicking on the checking bar will allow you to display a new bar chart. The new bar chart will display just the checking total split by another criteria; for example, one bar per branch office.
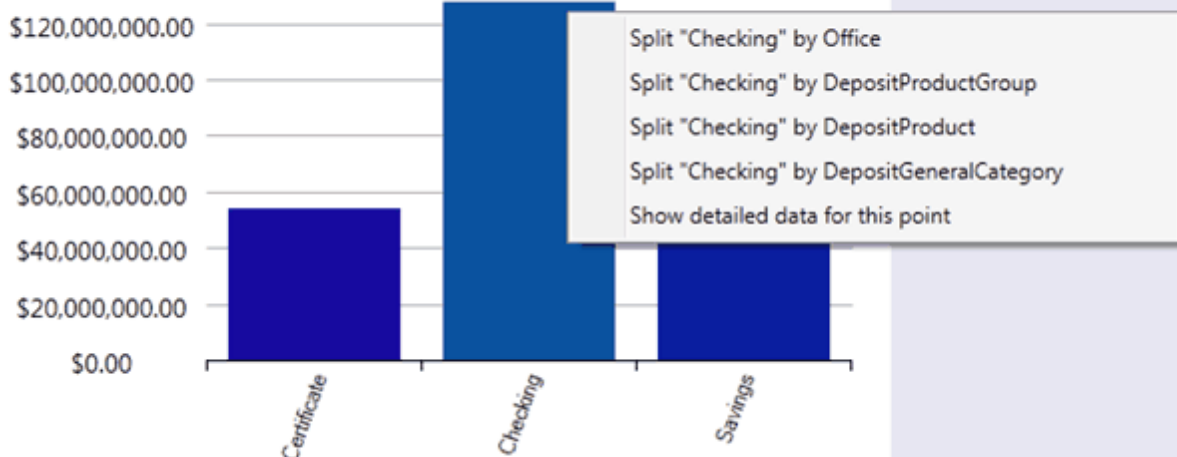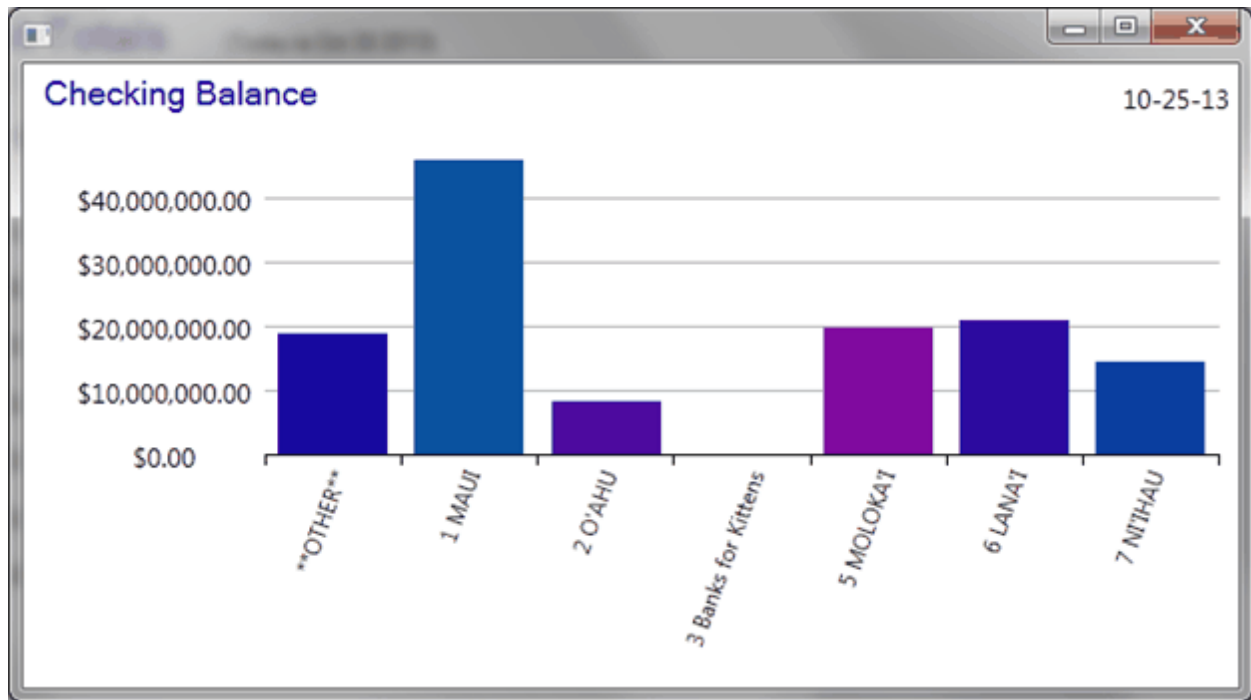
Scrolling

If a red arrow is on either side of the dashboard, it indicated that part of the dashboard is not being displayed. You can click on the arrow to scroll the dashboard, or you can click on an unused portion of the dashboard and drag to scroll the remainder of the dashboard.

History

Clicking on the history menu item will display the history of changes to the layout of the current dashboard. Clicking on a dashboard history item will display the dashboard in its previous state. This previous state can then be saved as the current state if you want to revert the dashboard layout back to some previous historical state.

Print

The print menu item allows you three separate print options. The portion of the dashboard that is currently in view can be printed to a printer, to a PDF file, or to a PNG file. PNG is a graphics format similar to JPG but utilizes a lossless compression scheme and works well on images containing large swathes of pixels of identical color.

⇨ **Next topic:** Creating and Modifying Dashboards

⬅ **Previous topic:** Security

Creating and Modifying Dashboards

New dashboards can be created by clicking on the New Dashboard menu item. This will cause the Dashboard Properties dialog to be displayed for the new dashboard. (See the example below.) Here you can name the dashboard, assign it to a category, select a color scheme, and choose whether the dashboard will be personal or shared. The Dashboard Properties dialog can also be displayed for an existing dashboard by clicking on the Dashboard Properties menu item. All options can be modified for existing dashboards except the personal/shared option. But remember that personal dashboards can be copied to the shared collection and vice

versa using the Open Dashboard dialog. FPS GOLD also has a variety of dashboards that can be copied to your account.
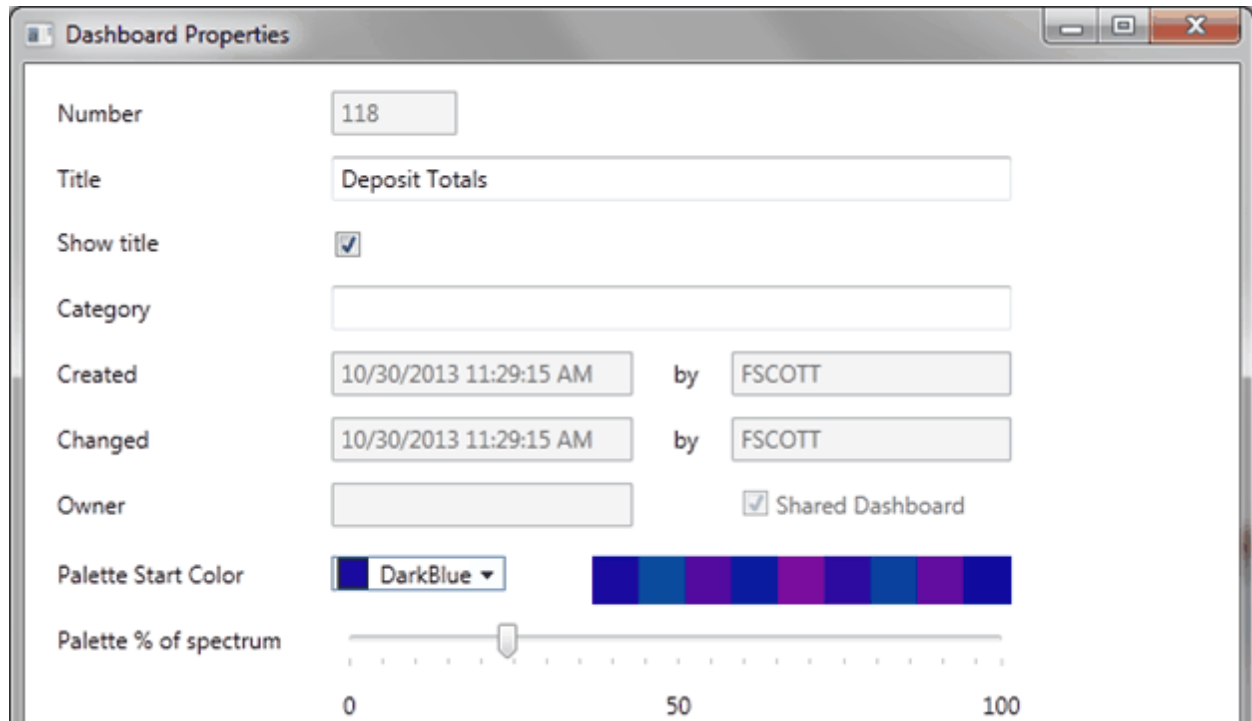
You can add tiles to a dashboard by clicking on the Add Tile menu item (see below). You can then choose the type of tile to add. Tile types are pie chart, bar chart, line chart, single value, grid, and sparkline with bullet graph. The new tile will be added to the dashboard and will initially be blank. Resize a tile by dragging its edges, move a tile by dragging its center, and delete a tile by right-clicking on the tile and selecting Delete Tile. You can also copy a tile and all its settings by right-clicking on the tile and selecting Copy Tile, then right-clicking on the dashboard and selecting Paste Tile.
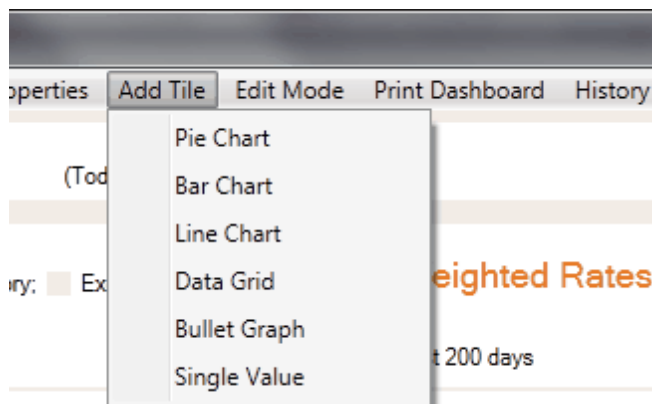
After you've made changes, click the Save Dashboard menu item to save your changes.

Next topic: Creating a Tile's Display

Previous topic: Using an Existing Dashboard

Creating a Tile's Display

Each type of tile has a unique tile settings dialog. The settings dialog is accessed by right-clicking on a tile and selecting the Tile Settings option. In general, these settings dialogs allow you to select a SQL table, and then select an aggregate from that table for display. Usually a tile will then allow you to choose how to split the aggregate. For example, do you want the lines on a chart to represent totals for each branch office, or totals for each account type, or totals for each delinquency status?

Additionally, tile settings dialogs allow the selection of a date or a date range in either relative (for example, last month) or absolute (for example, January 5, 2014) terms. And usually a tile settings dialog will allow the selection of a filter and filter value. Filters are always optional and will always provide a more narrow view of any aggregate. For example, in our example we can display a chart with lines representing aggregates for each account type, but only for branch 1 because we have selected filtering by Office and our filter value is 0001 MAUI.

LineChart Settings

Table	LoanSummary ▾
Graph this value	Balance ▾
Separate lines for each	LoanTypeGroup ▾

Hide these lines

ALL
OTHER
ARM
Charged O...
Commerc...
Commercial LOC
Contruction
Real Estate

Show these lines

Agricultural
Employee
Line Of Credit
...
Vehicle

Drag items between lists to hide or show. Use Ctrl or Shift to drag multiple items.

Filter by	Office ▾
Filter for	0001 MAUI ▾

☑ Use zero as floor (otherwise use lowest data point)
☑ Show Line Labels
☐ Show full date range even where no data exists
☐ Superimpose data from previous year

Title	1 MAUI Balance

◉ Relative Dates   ○ Absolute Dates

Start Date	First Day This Year ▾
	1/1/2013 [15]
End Date	Yesterday ▾
	8/8/2013 [15]

OK

1 MAUI Balance
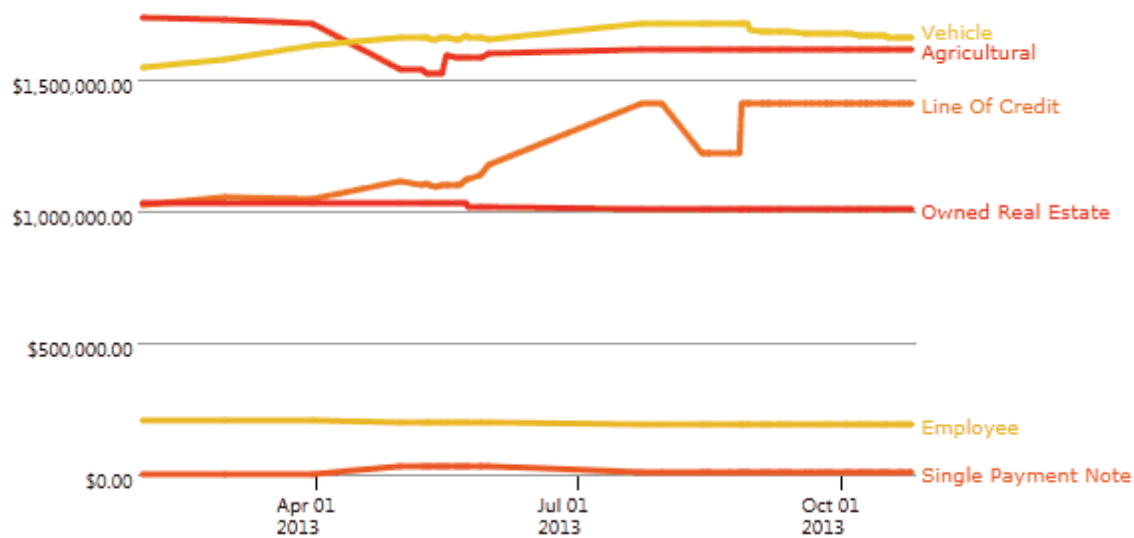
Settings dialogs for pie charts, line charts, bar charts, and single value are all very similar. The settings dialog for the bullet graph chart is quite different; this is because the bullet graph chart can contain many different bullets, all based on different tables and aggregates.
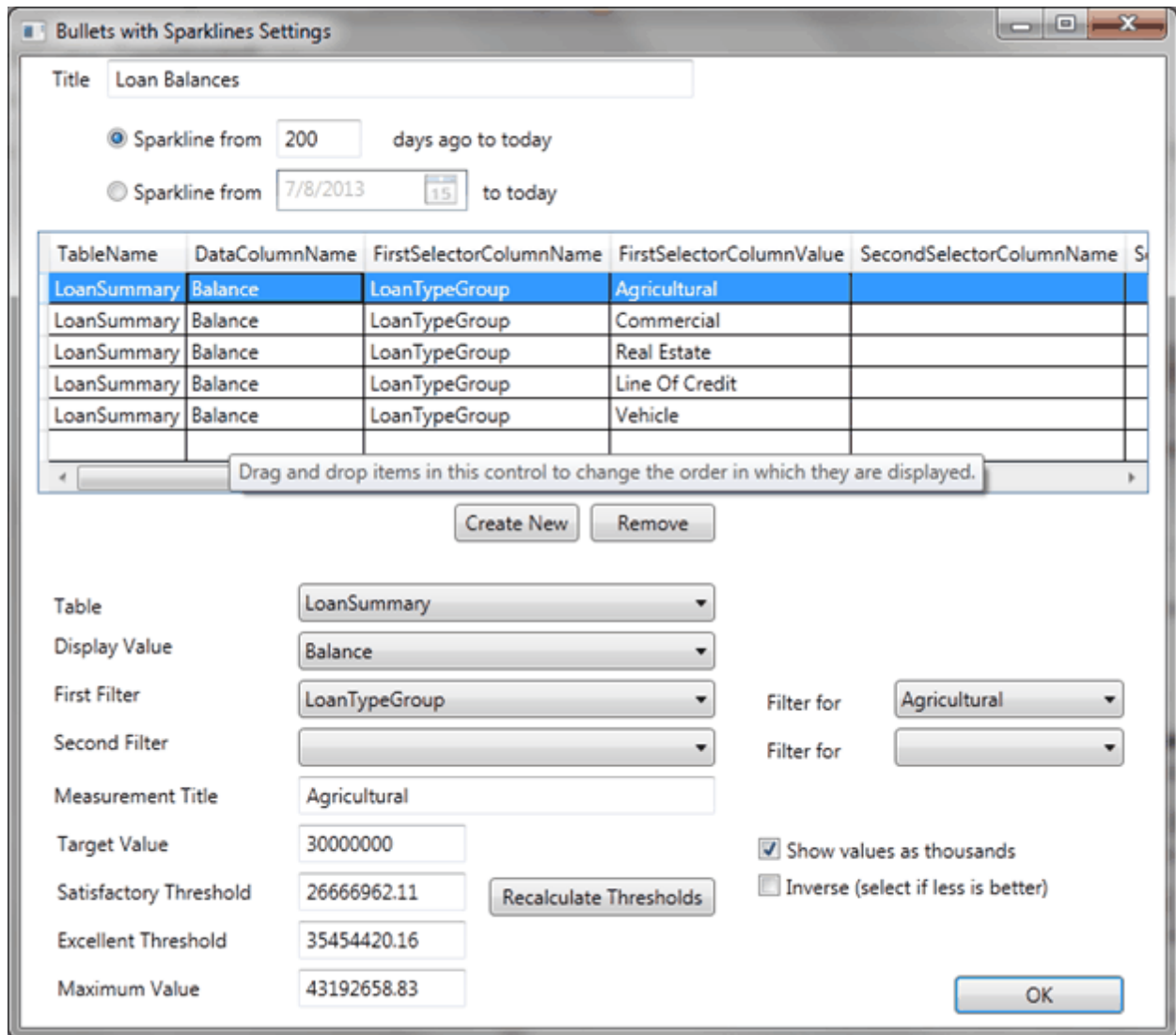
You can choose how many days to display in the sparkline that appears to the left of each bullet graph. Sparklines are a simple form of line graph meant to provide a quick sense of historical context. Each row on the grid represents a combination of sparkline/bullet graph/value that will be displayed on the tile. The selected row can be modified using the controls below the list view.

A bullet graph displays the selected aggregate value against a qualitative scale. On the scale there is a range for poor, satisfactory, and excellent. A maximum value is also necessary for the bullet graph to be rendered. Typically these values would be entered after discussion. However, to get the graph up and running, you can use the <Recalculate Thresholds> button. This button will calculate the various thresholds using historical data. You can also set a target value to be displayed on the bullet graph.

Loan Balances

(■ Actual; | Target; ■ Poor; ■ Satisfactory; ☐ Excellent; ● Alert)

Last 200 days	Metric	Comparison	Actual
	Agricultural (thousands) 0 10000 20000 30000 40000		$54,391,800.38
	● **Commercial** (thousands) 0 25000 50000 75000 100000 125000		$105,357,267.25
	Real Estate (thousands) 0 250		$6,570,197.51
	Line Of Credit (thousands) 0 1000 2000 3000 4000		$3,455,098.14
	Vehicle (thousands) 0 1000 2000 3000 4000 5000		$4,856,613.09

Commercial
Friday 10-25-13
$105,357,267.25
Right click to drill down

The red alert next to the sparkline indicates that a particular aggregate has fallen into the Poor range of the graph. The bullet provides additional data in the form of a tool tip and can be drilled into to show the detailed data that it was aggregated from.

NOTE

When VitalView identifies that yesterday's prior period(s) **GLAdjustedBalance**(s) differ from the current processing day's prior period(s) AccountAmount(s) (AA records), VitalView should update the **GLAdjustedBalance(s)** for the *last day* of the year and period(s) where the prior period amount changed and then all the way forward to the current day.

Next topic: [VitalView Spreadsheet Integration Screen](#)

Previous topic: [Creating and Modifying Dashboards](#)

VitalView Spreadsheet Integration

The purpose of the VitalView Spreadsheet Integration tool is to allow institutions to copy data from the VitalView database directly to an Excel spreadsheet. Some of the main capabilities of this tool are as follows:

- Allows a user to import, map, and process a spreadsheet *without* a local copy of Excel installed on a PC. (Because we are not using Excel locally to create the file, the user cannot run macros or publish the document to PDF *unless* there is a locally installed copy of Excel.)
- Allows a user to map from multiple summary tables to a single spreadsheet.
- Allows a user to immediately process the spreadsheet (Instant Process).
- Allows a user to schedule the process during afterhours.

Provide the ability for the user to upload and map excel spreadsheets, and then download the spreadsheets with customer data inserted into cells. This gives customers the flexibility to change reports on the fly for forecasting, to supply missing data, to update formulas and run macros, and to use other spreadsheet features to format the report they desire.

Upload and map spreadsheets to be used by the Spreadsheet Integration module for creating reports generated from spreadsheets. Spreadsheets can optionally be scheduled to automatically run using this function.

There are also some limitations you should be aware of.

- Protected worksheets do not allow macros to be run. The spreadsheet will still be populated with the data and the resulting spreadsheet will still contain the macros. The user can then manually run the macros if they want.
- XLSX (Excel 2007 and up) files will not process certain charts and graphs. There is no way to currently determine if an XLSX file contains these, so it would be best practice to have the user save the file as an XLS (2003) spreadsheet.
- Printing to PDF produces a raw print. The user must make sure that all print areas are set before import.
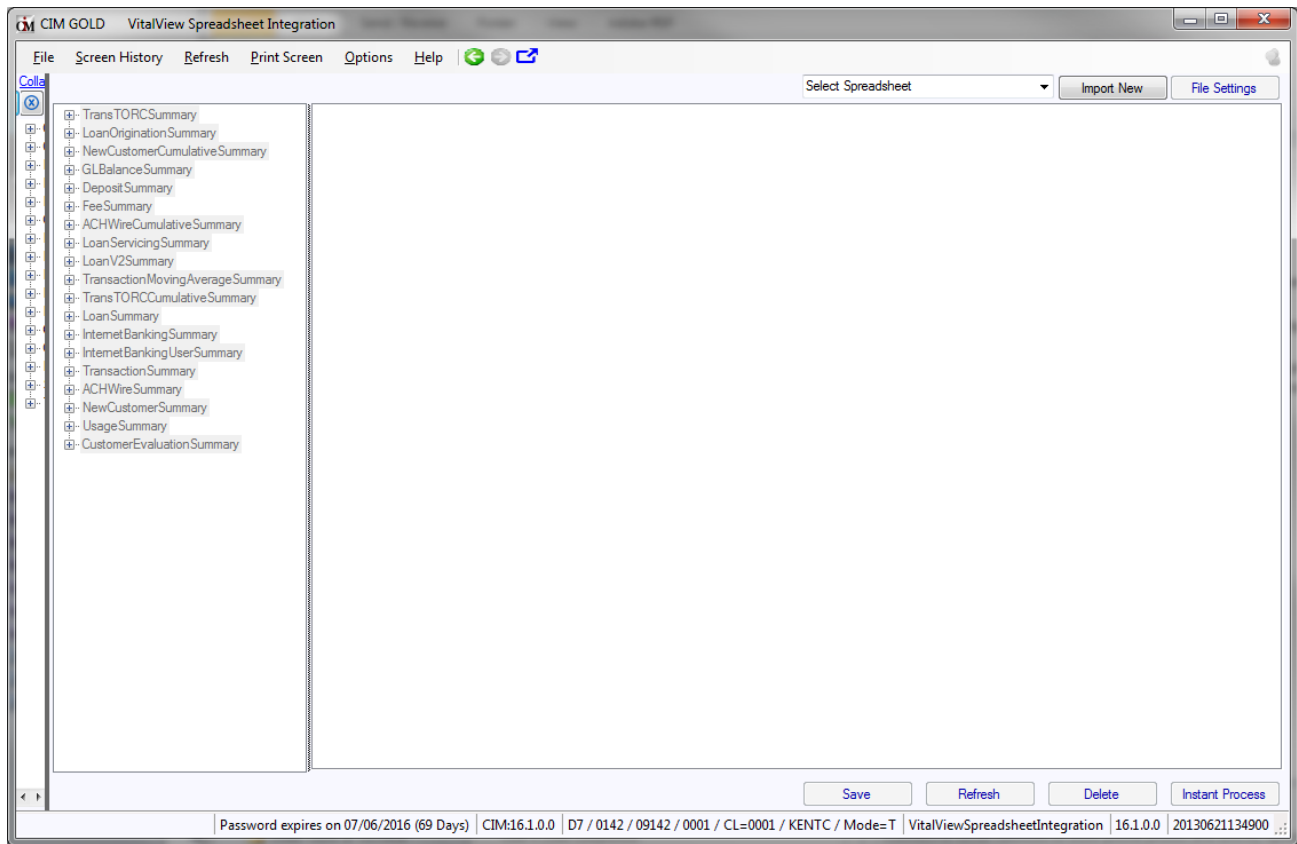
Column	Description
Select Spreadsheet drop-down list	This list is used to select already imported Excel spreadsheets.
Summary Report tree	tree…tree view of summary reports that the user has security for. Only enabled when a valid spreadsheet is selected. The tree cannot be expanded.
	Slider between Summary Report Tree and big white open area…can be used to increase/decrease view area.
	Big white open area…work area for mapping Vital View summary table fields to excel

Buttons
The following buttons are used on the VitalView Spreadsheet Integration screen.

<Import New>
Click this button to import a new Excel spreadsheet. A standard Open file dialog box will display.

<File Settings>
Click this button to change file settings for an imported Excel spreadsheet. The Settings dialog will display.

<Save>
Click this button to save the mapping data.

<Refresh>
Click this button to refresh previously mapped data.

<Delete>
Click this button to delete the imported Excel spreadsheet from the database.

<Instant Process>
Click this button to take the mapped spreadsheet, apply data from the selected VitalView summary fields, and produce either a new spreadsheet or a PDF file.

➡️ **Next topic:** Importing a New Spreadsheet

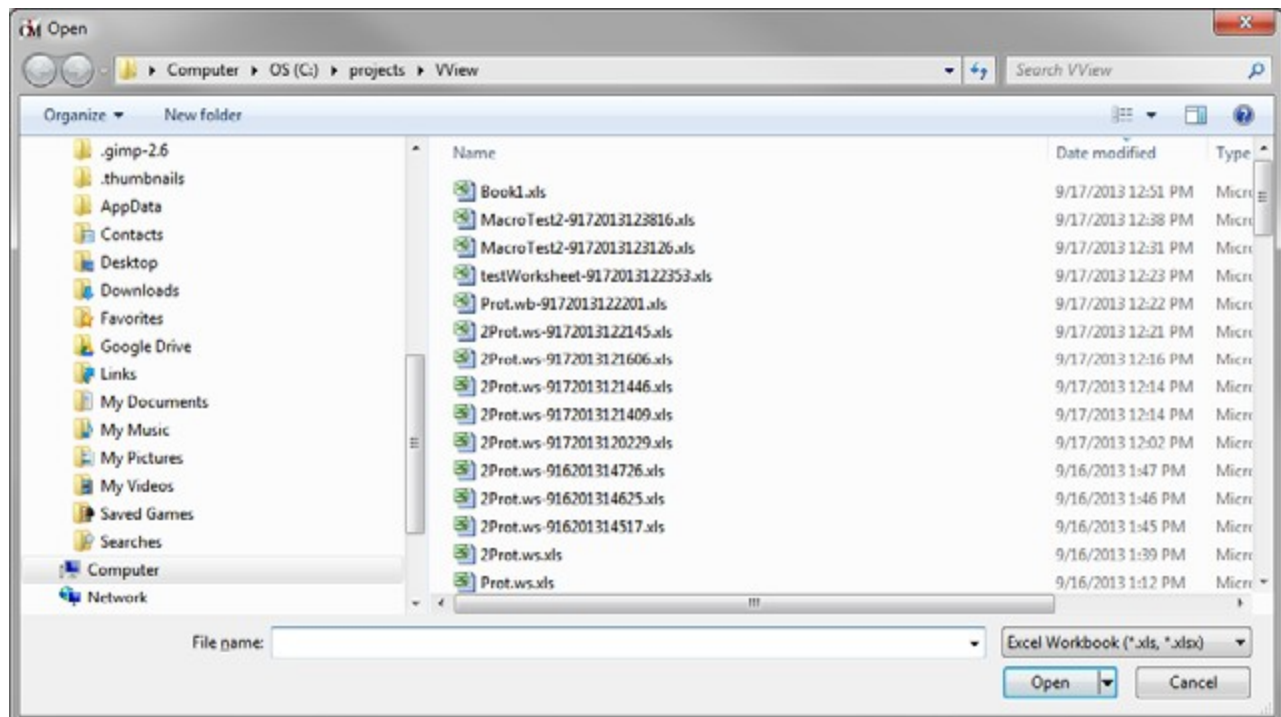⬅️ **Previous topic:** Creating a Tile's Display

Importing a New Spreadsheet

To open a new spreadsheet, perform the following steps.

1. Click <Import New>.

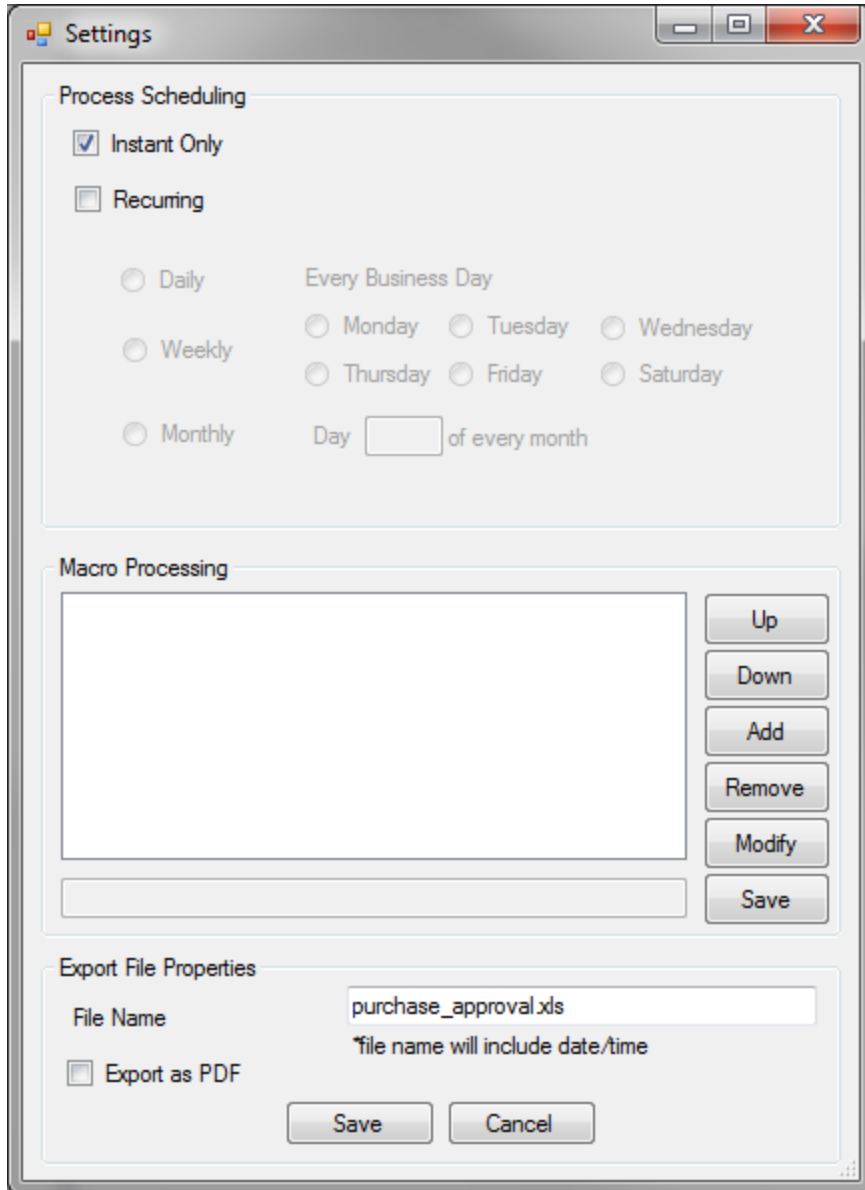   A standard Open dialog will display.

      From here you can import one or more spreadsheets. You can use "*.xls" or "*.xlsx" to import all the spreadsheets in the folder.

2. Select the spreadsheet(s) you want to import, then click <Open>.

The Settings dialog will display.

Settings

Process Scheduling
☑ Instant Only
☐ Recurring

○ Daily   Every Business Day
            ○ Monday   ○ Tuesday   ○ Wednesday
○ Weekly
            ○ Thursday ○ Friday   ○ Saturday

○ Monthly   Day [   ] of every month

Macro Processing

[   ]   Up
              Down
              Add
              Remove
              Modify
[   ]   Save

Export File Properties

File Name   [purchase_approval.xls]
            *file name will include date/time
☐ Export as PDF

[Save] [Cancel]

3. Make any necessary changes to this dialog. (See Settings Dialog for information on this dialog.)

4. Click <Save> to save the changes to the Settings dialog. The import will also be saved.

or

Click <Cancel> to cancel the changes to the Settings dialog. The import will also be canceled.
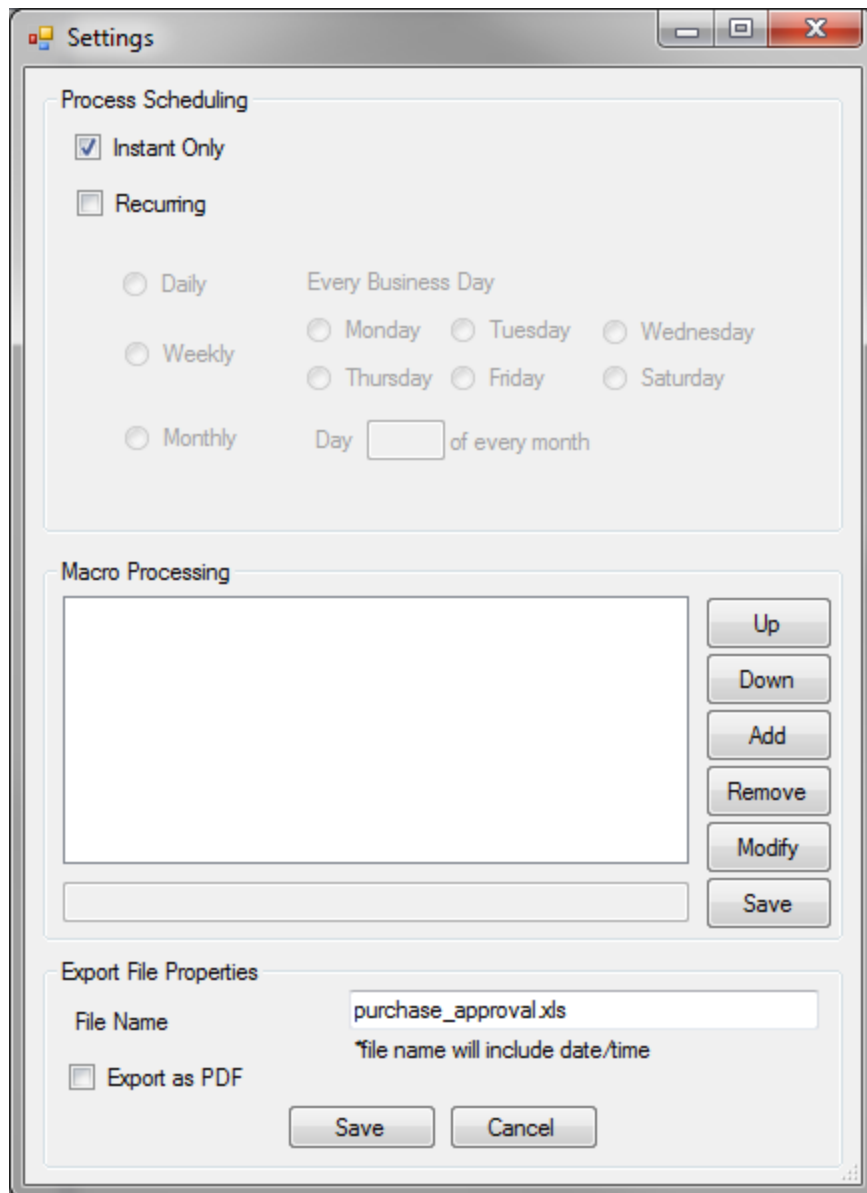
➡ **Next topic:** Settings Dialog

Settings Dialog

The Settings dialog displays automatically when you import a new spreadsheet. It also displays when you click the <File Settings> button for an open spreadsheet. An example is shown below.

Three main sections of the dialog

1. Process Scheduling
   a. The process scheduling section contains all the data for when the spreadsheet will be reproduced and populated with the current mapped data. The options are:

i. Instant only: There is not afterhours processing scheduled. The only way the spreadsheet will be populated is by manually pressing the "Instant Process" button on the main screen.

ii. Recurring: This is where afterhours process is scheduled. The options are:

1. Daily…spreadsheet will be generated every time afterhours are run

2. Weekly…spreadsheet will be generated on the specific day of week. If this falls on a holiday or non-processing day (Saturday), it will be processed the day before.

3. Monthly…on a specific day of the month. If this falls on a holiday, a non-processing day, or a non-existent day (Feb. 31st), it will be processed the day before.

b. It is important to note that in the case of holidays, non-processing days, or a non-existent day, processing will happen *before* the specified date.

2. Macro Processing

a. The Macro processing section contains all the data for processing macros *after* the spreadsheet has been populated with data. Currently, there is no way to determine whether a spreadsheet contains macros, or the order of macros to be run. Macro processing sections allows:

i. "Add" button…add a new macro.

1. The user must key in the macro name just as it is found in the workbook macro section.

2. If a macro name is keyed in incorrectly, the macro will not be found and therefore will not be run.

ii. "Remove" button…removes the selected macro from the list.

iii. "Modify" button…allows the user to modify the name of the macro.

iv. "Up" button…moves a selected macro up the list.

v. "Down" button…moves a selected macro down the list.

vi. "Save" button…saves the ordered list of macros.

b. It is important to note that macros must be named *exactly* as they are in the workbook and that the macros will be run in the order that they are shown in the list.

c. Macro limitations: (see limitations for macros). If the worksheet or work book is protected, then macros will not be able to run.

3. Export File Properties

a. The Export files Properties section is where the output file name is designated and the Export as PDF flag is set.

i. The file name will be used just as entered. The default file name is the name of the file. When processed, the file name will be appended with a date/time stamp to ensure that there are no duplicate files produces (ie. MacroTest2-9172013123816.xls)

ii. If the Export as PDF check box is checked, then the excel file is exported as a .PDF file and the excel file removed. There will not be a .XLS and a .PDF file with the same name.

Click <Save> to save the changes to the Settings dialog. If the Settings dialog is a result of an import, the import will also be saved.

or

Click <Cancel> to cancel the changes to the Settings dialog. If the Settings dialog is a result of an import, the import will also be canceled.

➡️ **Next topic:**

⬅️ **Previous topic:**