



# **Getting Started with the WATCHMAN Reliability Portal**

*Version 3.3*

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This manual is intended for customers using WATCHMAN Reliability Portal V3.3

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# Welcome!

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Welcome to WATCHMAN Reliability Portal!

The WATCHMAN Reliability Portal delivers the most current machine condition information and analyst recommendations for all of your monitored equipment via a single, secure Web interface.

Plant management and the maintenance staff can view equipment health company-wide or change views to see detailed information about a particular plant, area, or machine.

There is easy access to reports about equipment health, including the latest assessments by your analysts.

This one-stop, online reliability center also lets you link directly to thermography, motor, battery, and reciprocating engine/compressor analysis information.



The WATCHMAN Reliability Portal was designed to work seamlessly with your data collection efforts, whether vibration and scalar readings are gathered manually with a portable data collector or automatically with the WATCHMAN Online System.

This quick start guide will show you how to navigate the WATCHMAN Reliability Portal, including:

- [Logging in](#)
- [Changing your password](#)
- [Setting up email notifications](#)
- [Creating a Watch List](#) to track your most important assets from the Dashboard
- [Accessing diagnostic reports](#) about your equipment
- [Creating Custom Reports](#) on-the-fly

This guide is intended to help you get started. Full user documentation can be accessed online by clicking the help icon  on any Portal page.

# Logging In

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The WATCHMAN Reliability Portal is designed to work with the following browsers: Microsoft Internet Explorer 11, Google Chrome, and Microsoft Edge.

1. Open a Web browser and navigate to <https://www.WatchmanPortal.com>.

The screenshot shows the login interface for the WATCHMAN Reliability Portal. It includes a dark-themed header with the AZIMA logo and a language selector. The main content area features the portal's name and a login form with fields for Customer, Username, and Password, along with a LOGIN button and a Forgot Password? link. Below the form are four support options: Chat Live with an Expert, Email our Support Team, FAQs, and Watch Portal Demo. The footer contains copyright information and links to Terms of Use, Privacy Policy, and Contact Us.

2. Enter the following information.
  - a. In the **Customer** box, enter the customer name provided to you by Azima.
  - b. In the **Username** box, enter the login name provided to you by Azima.
  - c. In the **Password** box, enter the password provided to you by Azima.
3. Click the **LOGIN** button.

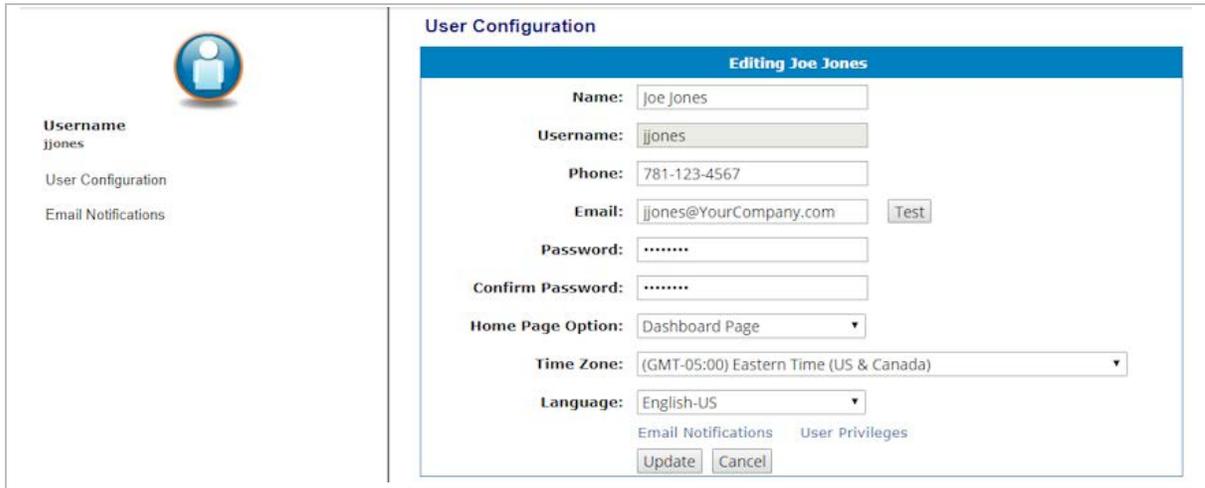
**Tip!** If you forget your password, enter your **Customer** name and **Username** and then click the **Forgot Password?** link. An email containing a link to re-set your password will be sent to the email address associated with your username. The re-set link is only active for one hour, so if you do not reset your password within that time, your "old" password remains intact. If you do not recall your **Customer** name or **Username**, you will need to contact Azima Technical Support. There are icons at the bottom of the page that connect you to Azima for help and/or more information. See "Getting Help" page 46.

# Changing Your Password

You can change your password at any time via the WATCHMAN Reliability Portal.

1. Choose **Preferences>User** to see your user configuration information.

**Note:** If a list of users appears, it means you have advanced privileges and can edit the passwords of others. To change a password, click the **Edit User** button next to the user whose password you want to change, and then continue with Step 2 below.

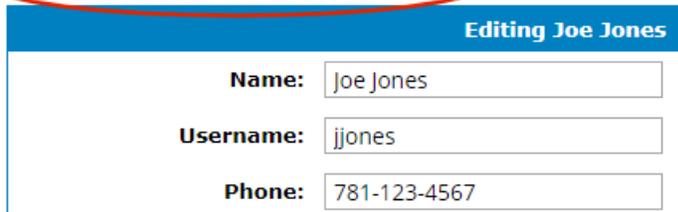


The screenshot shows the 'User Configuration' page for 'Joe Jones'. On the left, there is a sidebar with a user icon and links for 'Username jones', 'User Configuration', and 'Email Notifications'. The main content area is titled 'Editing Joe Jones' and contains the following fields: 'Name: Joe Jones', 'Username: jjones', 'Phone: 781-123-4567', 'Email: jjones@YourCompany.com' (with a 'Test' button), 'Password: .....', 'Confirm Password: .....', 'Home Page Option: Dashboard Page', 'Time Zone: (GMT-05:00) Eastern Time (US & Canada)', and 'Language: English-US'. At the bottom, there are links for 'Email Notifications' and 'User Privileges', and 'Update' and 'Cancel' buttons.

2. In the **Password** box, type the new password. Passwords must be at least eight characters and include at least one numeral.
3. In the **Confirm Password** box, re-type the password.
4. Click the **Update** button. A message appears to let you know that the change was successful. You must use the new password the next time you log in.

## User Configuration

Updated user Joe Jones successfully.



The screenshot shows the 'Editing Joe Jones' page with the following fields: 'Name: Joe Jones', 'Username: jjones', and 'Phone: 781-123-4567'. The 'Update' button is visible at the bottom.

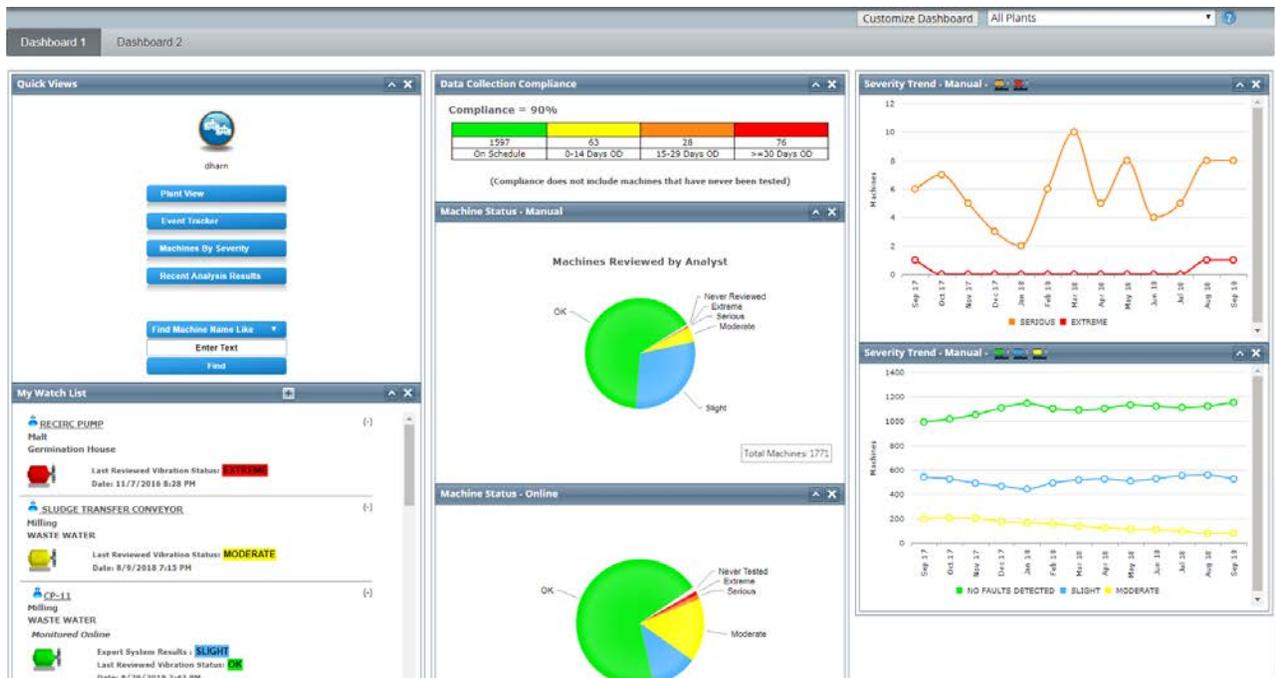
An automated email is sent containing the new password. If you changed the password of another user, this lets them know their password has been changed so they can make note of the new one.

# Dashboard View

The WATCHMAN Reliability Portal comes with two customizable Dashboards that enable you to display the information that is most important to you and your reliability program.

More than a dozen Dashboard elements provide key information and at-a-glance reliability metrics. By default, the most popular elements are shown on Dashboard 1. However, both Dashboards are fully customizable, so you can adjust them to meet your program's needs.

A drop-down list in the upper right of the page dynamically filters the Dashboards to show information about a single plant or all plants in your program. (The My Watch List element is the only exception. It always shows the machines you added to it, regardless of what is selected from the filtering drop-down list.)



Things to know about the Dashboards:

- When you log in to the WATCHMAN Reliability Portal, Dashboard 1 is the default home page. If you prefer to see the Program View page first, you can specify it as your default home page, as explained on page 25.
- To return to Dashboard 1 from any Portal page, choose **View>Dashboard**. If you did not change your default home page to Program View, you can also click the WATCHMAN Reliability Portal logo (or your company logo if you have a customized Portal) in the upper left of any Portal page to return to Dashboard 1.
- Dashboard 1 always displays first; you must toggle to Dashboard 2 by clicking its tab. To ensure this is not an issue, customize Dashboard 1 to include the elements that are most important to you.
- For most elements, you can click the heading/title bar to see more information. For example, click the heading of the **Machine Status - Manual** element to see a list of all manually monitored machines represented in that pie chart in order of severity. If the Dashboard is filtered to a single plant, it shows machines in that plant. If **All Plants** is selected from the drop-down list, machines across all of your plants are included.
- You do not have to use all of the available elements.
- The **Dashboard 2** tab is always visible, but there is no requirement to use it.
- You only see information about the plants and areas to which your login has permission. This means that if you select **All Plants**, you will only see information about the plants (and the areas within those plants) to which your login has permission. If you select a particular plant from the drop-down, you will only see information for the areas to which your login has permission.
- To customize one or both Dashboards, click the **Customize Dashboard** button.

## Dashboard Elements

All of the available Dashboard elements are described below. The quality and importance of these elements grow as your program matures. For example, the element showing the top five root causes at your plant(s) becomes more meaningful as faults are detected and confirmed. Several elements are directly tied to your use of the Event Tracker. (For more about the Event Tracker, see the Portal's online help.)

The Dashboard information presented is relative only to the plant selected from the drop-down list in the upper right of the Dashboard. If **All Plants** is selected, then the information is combined for all plants.



**Note:** The My Watch List element is not impacted by your selection. It always shows all machines added by you, regardless of the plant selected from the drop-down list.

# Quick Views

The Quick Views element provides three buttons that let you quickly access key information about your PdM program. It also shows the user name of the currently logged in user.

- **Plant View / Program View** - If the Dashboard is filtered to a single plant, a **Plant View** button appears so you can open the Plant View page for the selected plant. If the filtering drop-down at the top of the page is set to **All Plants**, a **Program View** button appears so you can see an overview of all of the monitoring across all of your plants.
- **Event Tracker** - Click this button to open the Event Tracker. If the Dashboard is filtered to a single plant, the Event Tracker for that plant opens. If the filtering drop-down list is set to **All Plants**, the Event Tracker for the entire database opens.



- **Machines By Severity** - Click this button to generate a list of all machines ordered by severity, with those with at least one **Extreme** fault appearing first. How your Dashboard is filtered determines whether you will see all machines in a particular plant or all machines across all of your plants.
- **Recent Analysis Results** - Click this button to see the last 20 reports posted for the selected plant or across all of your plants. How your Dashboard is filtered affects the list shown.
- **Find Machine Name/Identifier Like** - Enter a term in the box and click **Find** to search for machines that contain that term in its machine name or identifier. If the Dashboard is filtered to a particular plant, this tool only searches that plant. If the Dashboard is filtered to **All Plants**, this tool searches all plants. A drop-down list lets you specify whether to search by machine name or identifier.
  - **Find Machine Name Like** - Select this if you plan to enter a full machine name (DWW #2 Pump) or partial name (pump). If you enter an exact machine name, it opens the Machine Detail page for that machine. If you enter a partial name, it generates a list of machines containing the term.

- **Find Machine Identifier Like** - Select this if you plan to enter a full machine identifier or part of one. If you enter an exact machine identifier, it opens the Machine Detail page for that machine. If you enter a partial identifier, it generates a list of machines containing those characters.

**Note:** "Wildcards" are automatically inserted before and after the entered search term. This means the term can be anywhere in the machine name or identifier.

## My Watch List

Use this element to customize a list of machines to which you want quick access.

Typically, these are your most critical and/or problematic assets whose health status you want to review quickly and frequently.

Machines appear in order of severity, with those deemed **Extreme** appearing at the top.

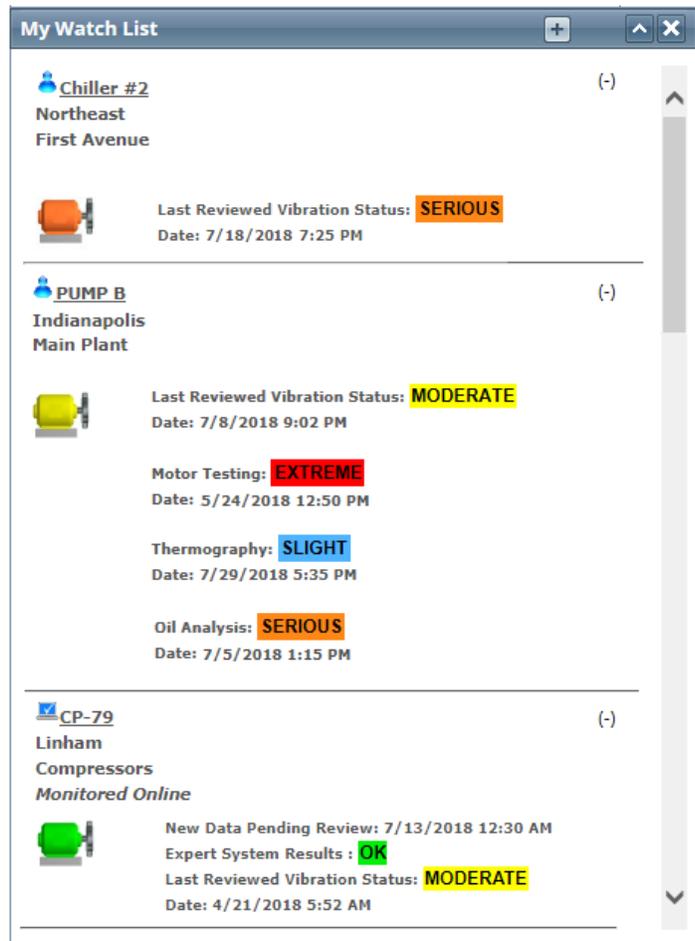
The color-coding of each machine is based on the last Analyst Reviewed Result. If newly collected data is awaiting review, it is noted and the machine name is preceded with the following icon: 

If other technologies are associated with the machine (oil, thermography, etc.), they are listed below the vibration information and show the date the last report was uploaded to the Portal and the status assigned to it by the person who posted it.

The statuses of technologies other than vibration DO NOT affect the machine status indicated by the machine icon. The color of this icon is the vibration status from the last time an analyst reviewed the vibration data.

Machines monitored with the WATCHMAN Online System have "Monitored Online" below the plant/area in the upper left corner. Because SPRITE data acquisition devices are always gathering new data and running it through the expert system, the most recent Expert System Status is shown in addition to the Last Reviewed Vibration Status. Often, the Expert System Results are newer, as analysts only review data on a schedule and/or when the expert system detects a notable change.

**Important!** This is the only element that is NOT impacted by how the Dashboard is filtered. All of the machines you add to the list always appear, even if you filter the Dashboard to a single plant for which there are no My Watch List machines.



**My Watch List**

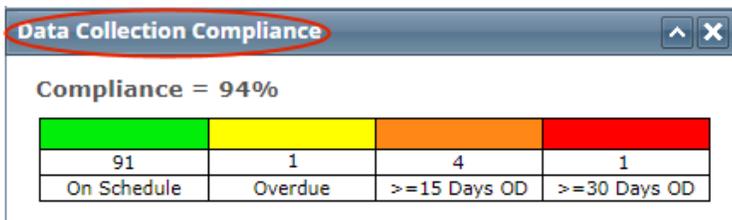
- Chiller #2** (-)  
Northeast  
First Avenue  
 Last Reviewed Vibration Status: **SERIOUS**  
Date: 7/18/2018 7:25 PM
- PUMP B** (-)  
Indianapolis  
Main Plant  
 Last Reviewed Vibration Status: **MODERATE**  
Date: 7/8/2018 9:02 PM  
Motor Testing: **EXTREME**  
Date: 5/24/2018 12:50 PM  
Thermography: **SLIGHT**  
Date: 7/29/2018 5:35 PM  
Oil Analysis: **SERIOUS**  
Date: 7/5/2018 1:15 PM
- CP-79** (-)  
Linham  
Compressors  
Monitored Online  
 New Data Pending Review: 7/13/2018 12:30 AM  
Expert System Results: **OK**  
Last Reviewed Vibration Status: **MODERATE**  
Date: 4/21/2018 5:52 AM

## Data Collection Compliance

This element calculates a data collection compliance percentage so you know whether the machines in your program are being tested on schedule. A table below the percentage shows how many machines are on schedule with their collection and how many are overdue (and how overdue they are).

The information shown is either relevant to a single plant or across all of your plants, depending on how your Dashboard is filtered. Only machines from which data is collected manually with a TRIO vibration data collector are included in this element. Machines monitored via the WATCHMAN Online System are not factored into this compliance element.

Click the **Data Collection Compliance** title bar to generate an Overdue Machines report for the plant (or all plants).

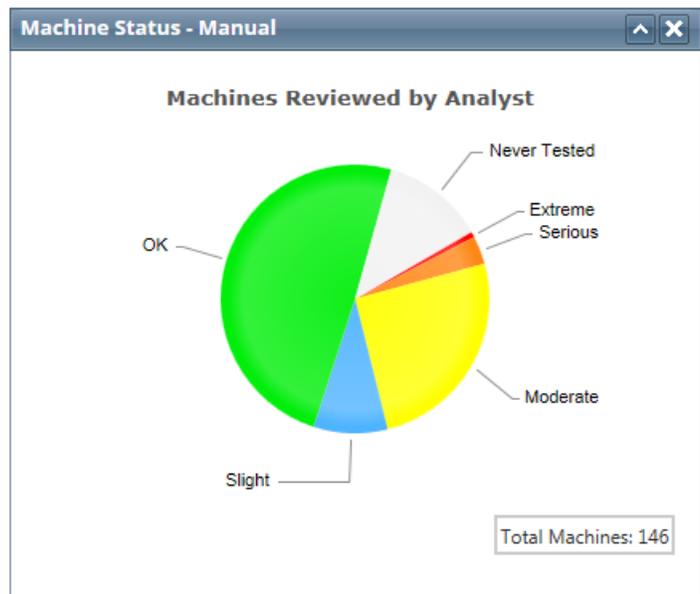


## Machine Status - Manual

Machines from which data is collected manually with a TRIO data collector are summarized in this section. A pie chart shows how many machines are in each state of health.

Click the **Machine Status - Manual** link in this element's title bar to generate a report showing all of the manually monitored machines in order of health status, with the most severe appearing first. This pie chart shows the status from the last analyst review. This means that if data has been collected, but not reviewed by an analyst, that data is not represented in the chart (even if it has been run through the expert system).

How your Dashboard is filtered determines whether this pie chart represents machines from a single plant or from all of your plants.



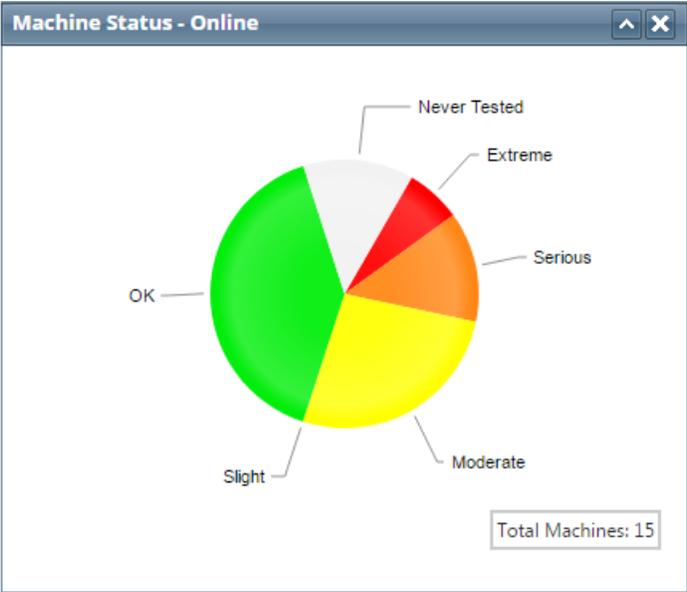
# Machine Status - Online

Machines from which data is automatically collected by the WATCHMAN Online System are summarized in this section.

A pie chart shows how many machines are in each state of health.

Click the **Machine Status - Online** link in this section's title bar to generate a list of online monitored machines in the plant in order of health status, with the most severe appearing first. This pie chart is based on the current machine status.

How your Dashboard is filtered determines whether this pie chart represents online monitored machines from a single plant or from all of your plants.

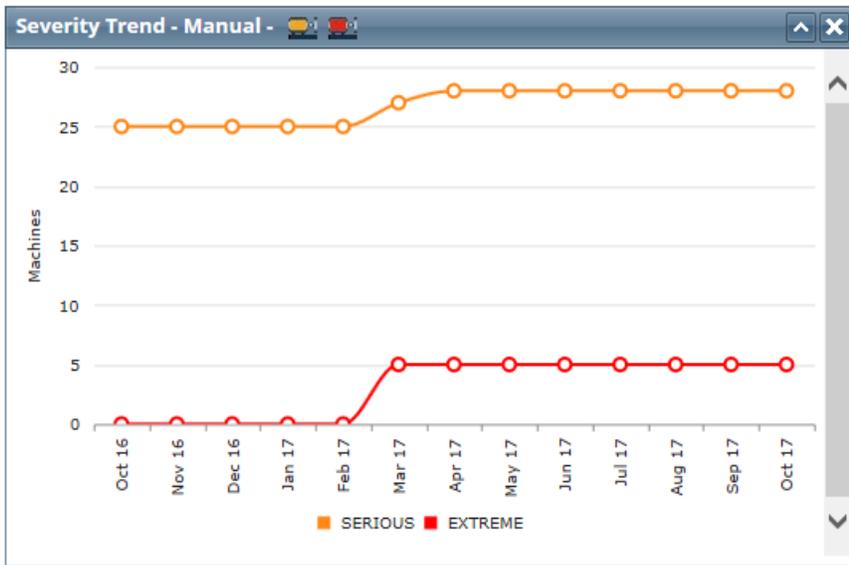


# Severity Trend - Manual - Serious, Extreme

This element graphs the number of machines with **Serious** and **Extreme** statuses over the past year.

It only includes machines from which data is manually collected with a TRIO data collector and is based on Analyst Reviewed Results.

Mouse over any plotted point to see the severity level and the number of machines in that state for that month.



Click this element's title bar to see the last seven statuses for *each* machine that has had a **Serious** and **Extreme** status during the past year. If there have not been at least seven analyst reviews for a machine, you will see fewer bars.

If your Dashboard is filtered to show a particular plant, the name of that plant appears at the top of the list. If the Dashboard is filtered to **All Plants**, you will not see a plant name (as pictured below).

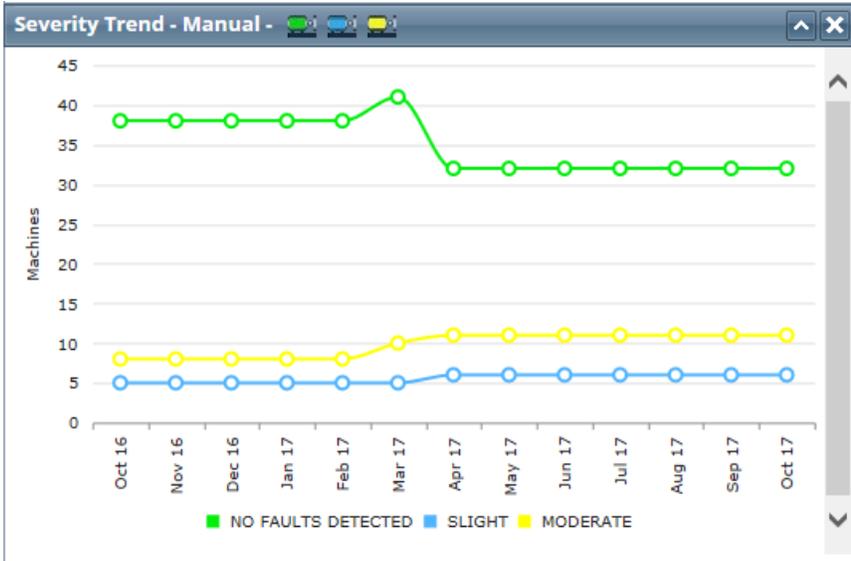
Machines With Severity >= Serious							
Machine Name	Last Reviewed Dates						
NO.1 GRIND MILL	Apr17	May17	Jun17	Jul17	Aug17	Sep17	Oct17
DISINTEGRATOR	May17	Jun17	Jul17	Aug17	Sep17		
SCRUBBER BLOWER	Apr17	May17	Jun17	Jul17	Aug17	Sep17	Oct17
INDUCED DRAFT FAN	Apr17	May17	Jun17	Jul17	Aug17	Sep17	Oct17

# Severity Trend - Manual - Moderate, Slight, No Faults

This element graphs the number of machines with **Moderate**, **Slight**, and **No Fault** statuses over the past year.

It only includes machines from which data is manually collected with a TRIO and is based on Analyst Reviewed Results.

Mouse over any plotted point to see the severity level and the number of machines in that state for that month.



Click this element's title bar to see the last seven statuses for *each* machine that has had a **Moderate**, **Slight**, and **No Fault** status during the past year. If there have not been at least seven analyst reviews for a machine, you will see fewer bars.

If your Dashboard is filtered to show a particular plant, the name of that plant appears at the top of the list. If the Dashboard is filtered to **All Plants**, you will not see a plant name (as pictured below).

Machines With Severity <= Moderate							
Machine Name	Last Reviewed Dates						
COOLING FAN	Apr17	May17	Jun17	Jul17	Aug17	Sep17	Oct17
NO.7 AIR CMPRSR	Nov16	Jan17	Mar17	May17	Jun17	Jul17	Sep17
NO.8 AIR CMPRSR	Sep16	Nov16	May17	Sep17			
PRIMARY AIR FAN	Sep16	Nov16	Jan17	May17	Jun17	Jul17	Sep17

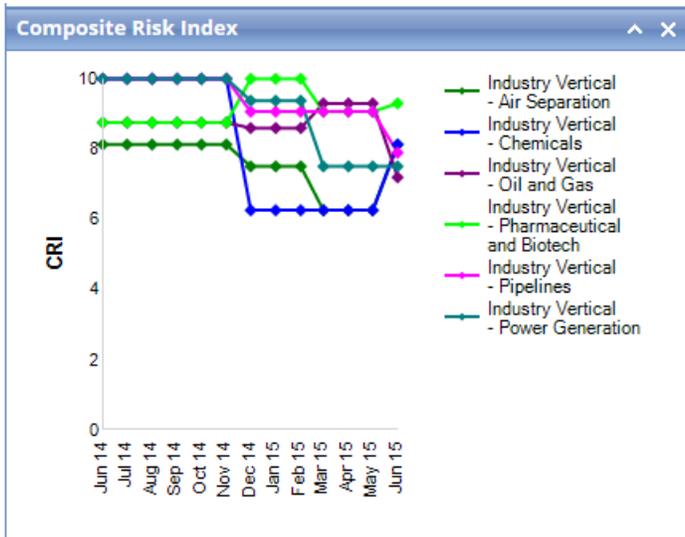
# Compound Risk Index

The Compound Risk Index (CRI) element shows the amount of operational risk to production associated with the continued operation of your machines based on the severity of their faults.

Click the **Compound Risk Index** link in the title bar to open a CRI report that shows the operational risk to production associated with the continued operation of a the machines in your plant.

**Important!** This element requires an operational significance be specified for each machine, which is done via ExpertALERT. If you are a WATCHMAN Service customer, your Azima Analyst will enter the information you provide. An operational significance of 1 means the machine has little to no impact on your program; 10 means the machine is extremely critical to production. If you do not specify operational significance, do not add this element to your Dashboard because it will not provide any meaningful results.

You can also create a custom CRI Report containing only the machines you want via the **Create Custom Report** menu.



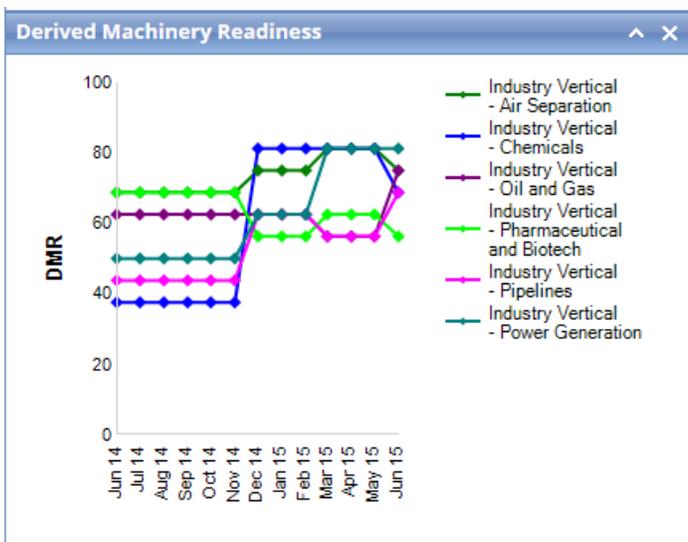
## Derived Machinery Readiness

The Derived Machinery Readiness element shows the overall readiness of the machines in your plant. Readiness is represented by a percentage—the higher the percentage the more ready the fleet. The DMR rating takes into account the number of faults reported for each machine, the severity of those faults, and the importance of each machine to production.

Click the **Derived Machinery Readiness** link in the title bar to see a DMR report summarizing the overall readiness of your fleet.

**Important!** This element requires an operational significance be specified for each machine, which is done via ExpertALERT. If you are a WATCHMAN Service customer, your Azima analyst will enter the information you provide. An operational significance of 1 means the machine has little to no impact on your program; 10 means the machine is extremely critical to production. If you do not specify operational significance, do not add this element to your Dashboard because it will not provide any meaningful results.

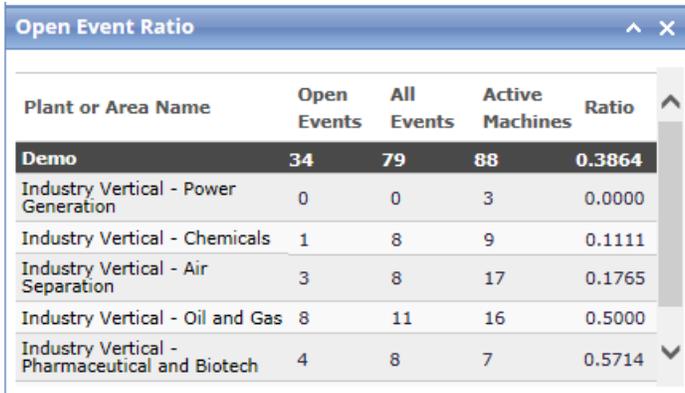
You can also create a custom DMR report containing only the machines you want via the Create Custom Report menu.



## Open Event Ratio

The Open Event Ratio element shows the ratio of open-event faults to active machines. Open events are recommendations that have been identified by an analyst within the last 365 days and have a status of “Open” in the Event Tracker. A low number indicates quality machine repair practices, consistent data collection techniques, and rapid resolution of identified issues.

If you do not use the Event Tracker to track repairs and confirm analyst findings, do not add this element to your Dashboard as it will not display any meaningful information.



Plant or Area Name	Open Events	All Events	Active Machines	Ratio
<b>Demo</b>	<b>34</b>	<b>79</b>	<b>88</b>	<b>0.3864</b>
Industry Vertical - Power Generation	0	0	3	0.0000
Industry Vertical - Chemicals	1	8	9	0.1111
Industry Vertical - Air Separation	3	8	17	0.1765
Industry Vertical - Oil and Gas	8	11	16	0.5000
Industry Vertical - Pharmaceutical and Biotech	4	8	7	0.5714

## Proactive Response Index

This Proactive Response Index element shows the completion rate of analyst-recommended actions within 60 days of reporting, sorted by level of urgency. The score is affected by fixing machine problems and retesting after repair—the sooner the actions are taken, the higher the score.

Only Recommended Actions from the past 180 days are included.

If you do not use the Event Tracker to track repairs and confirm analyst findings, do not add this element to your Dashboard as it will not display any meaningful information.

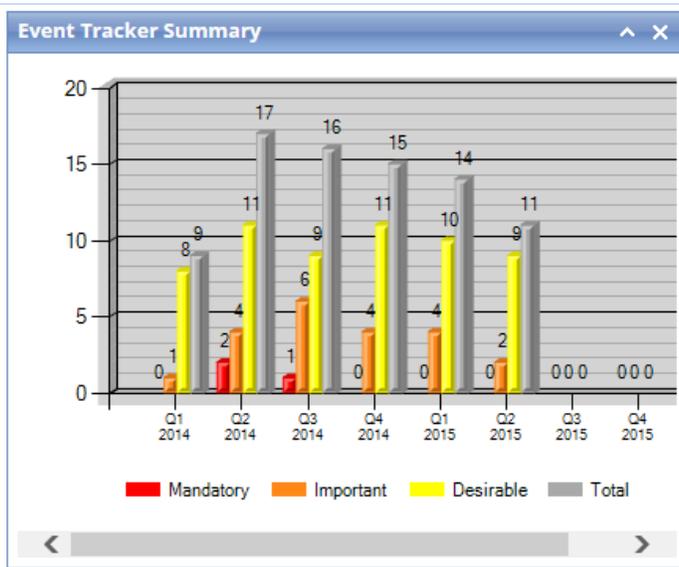


Plant or Area Name	All	Mandatory	Important	Desirable
<b>CO</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>1.0000</b>
Donville	2	2	2	1.0000

# Event Tracker Summary

The Event Tracker Summary element provides a snapshot view of the number of repair recommendations in the Event Tracker, sorted by level of urgency. The information in the Event Tracker is populated when an analyst confirms a fault for a machine.

If you do not use the Event Tracker to track repairs and confirm analyst findings, do not add this element to your Dashboard as it will not display any meaningful information.



# Top Five Root Causes

The Top Five Root Causes element shows the five most frequently reported root causes across your program. The data is presented in a quarterly and annual view. The information comes from what you enter in the Event Tracker when you confirm the root cause of called faults.

If you do not use the Event Tracker to track repairs and confirm analyst findings, do not add this element to your Dashboard as it will not display any meaningful information.

This element becomes more meaningful faults are confirmed over time. If there are not five root causes listed, it means there have not been five different faults detected.

Root Cause	Current Year 2015					Previous Year 2014				
	Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total
Assembly Problem	1	0			1	0	0	0	0	0
Design flaw	1	0			1	0	0	0	0	0

## Average Time to Repair

The Average Time to Repair element shows the average time it took to repair a fault based on the initial date of reporting and latest priority stored in the Event Tracker.

If you do not use the Event Tracker to track repairs and confirm analyst findings, do not add this element to your Dashboard as it will not display any meaningful information.

Average Time To Repair				
	Current Year 2017		Previous Year 2016	
Priority	Average Days	Number Of Events	Average Days	Number Of Events
Mandatory	0	0	174	7
Important	130	5	97	35
Desirable	171	11	126	118

## Percent Root Cause Evaluations

The Percent Root Cause Evaluations element displays the root causes that occur most frequently as a percentage. It is based on the information you enter via the Event Tracker. This information can help you can identify maintenance issues, such as improper lubrication, temperature problems, etc.

If you do not use the Event Tracker to track repairs and confirm analyst findings, do not add this element to your Dashboard as it will not display any meaningful information.

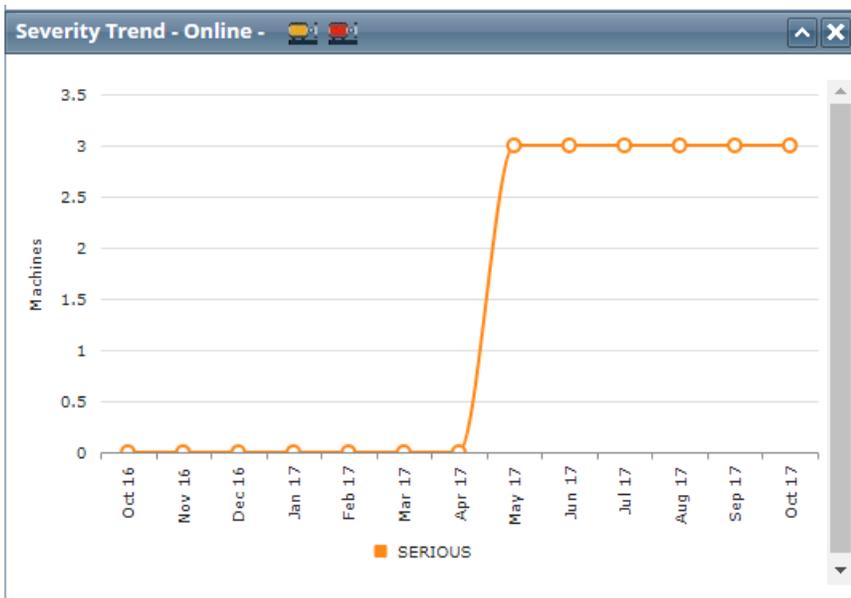
Percent Root Cause Evaluations										
	Current Year 2017					Previous Year 2016				
Root Cause	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
Assembly Problem	50%	0			50%	0	0	0	0	0
Design flaw	50%	0			50%	0	0	0	0	0

## Severity Trend - Online - Serious, Extreme

This element graphs the number of online monitored machines with **Serious** and **Extreme** statuses over the past year.

It only includes machines from which data is automatically collected via the WATCHMAN Online System and is based on the current machine status.

Mouse over any plotted point to see the severity level and the number of machines in that state for that month.



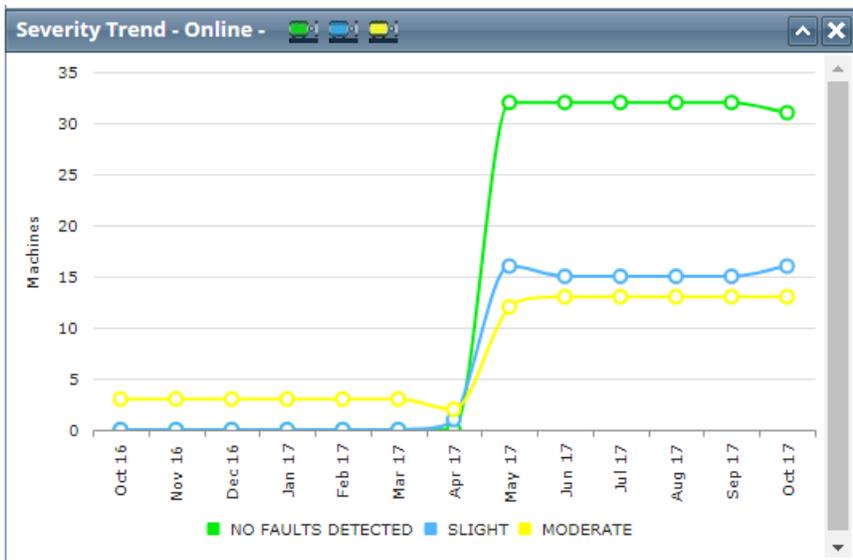
Click this element's title bar to see the last seven statuses for each online-monitored machine that has had a **Serious** and **Extreme** status during the past year. If there have not been at least seven months in which there was at least one test for a machine, you will see fewer bars. If your Dashboard is filtered to show a particular plant, the name of that plant appears at the top of the list. If the Dashboard is filtered to **All Plants**, you will not see a plant name.

## Severity Trend - Online - Moderate, Slight, No Fault

This element graphs the number of online monitored machines with a **Moderate**, **Slight**, and **No Fault** statuses over the past year.

It only includes machines from which data is automatically collected via the WATCHMAN Online System and is based on the current machine status.

Mouse over any plotted point to see the severity level and the number of machines in that state for that month.



Click this element's title bar to see the last seven statuses for each online-monitored machine that has had a **Moderate**, **Slight**, and **No Fault** status during the past year. If there have not been at least seven months in which there was at least one test for a machine, you will see fewer bars. If your Dashboard is filtered to show a particular plant, the name of that plant appears at the top of the list. If the Dashboard is filtered to **All Plants**, you will not see a plant name.

## Synchronization Activity

The Synchronization Activity element shows the last time each subscription database synchronized (replicated) to the ExpertALERT-Cloud master database and whether there are any pending messages from the master.

The synchronization process is a two-way operation. Subscription databases, such as the database on a TRIO, sync and send collected data to ExpertALERT-Cloud. "Messages" from ExpertALERT-Cloud, such as a change to the phase collection settings for a location, are pulled down to the subscription.

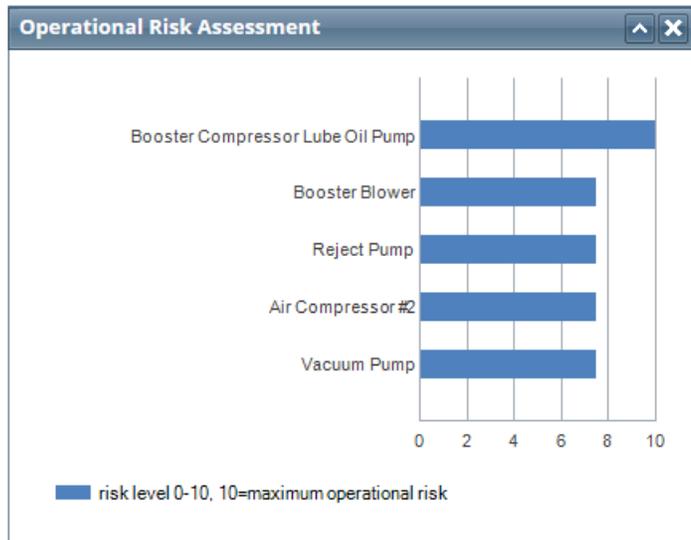
If the **Pending Messages** column shows anything other than zero, it is an indication that the database needs to synchronize/replicate.

This element is very helpful for facilities with multiple TRIOs.

Site Name	Site Description	Last Replicated	Pending Messages
Site0013	Rapids	9/1/2017 2:43 PM	148
Site0022	Cedarwood	9/20/2017 2:08 PM	2
Site0025	Hudson	9/21/2017 6:57 PM	0
Site0008	Schlott	9/22/2017 6:20 PM	0

## Operational Risk Assessment

The Operational Risk Assessment shows the machines with the highest operational risk to production based on the faults detected and how critical the machine is to production. The closer the machine is to 10, the higher the risk.



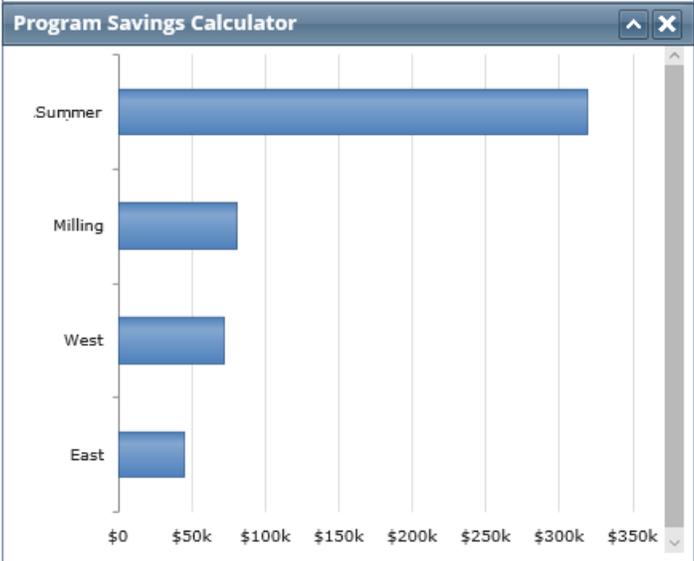
# Program Savings Calculator

This element tracks the savings your plants are realizing due to the early detection of machinery faults. By repairing faults before they escalate to failure, your maintenance department spends less on replacement parts, overhauls, overtime, etc. The calculations are based on general industry estimates.

Among the factors considered are:

- Severity of the detected faults at your plants
- Likelihood of equipment failure if faults were not detected
- Replacement and overhaul costs

Additional substantial financial considerations not directly considered include overtime labor and production loss costs associated with repairs and downtime.



# My Watch List

As explained in the “*Dashboard Elements*” section on page 5, the My Watch List element lets you track machine health quickly from one place, even if the assets are in different plants or areas. Once added, machines appear in order of severity, with those deemed **Extreme** listed first. You can add as many machines as you want to the list. Creating a Watch List is optional. The following shows the information that appears for each machine you add to the Watch List.

The color of the icon represents the machine state based on the last time an analyst reviewed vibration data. The date and time is in GMT and represents the date/time of the data that was reviewed.

**Note:** If new data has been collected but not reviewed, the icon next to the machine name will change to a computer (🖥️) and “New Data Pending Review” appears with the date/time of the new data, as shown below.

Click the name of the machine to see more information about it, including additional test results.

Click to remove this machine from the My Watch List element. You will not be prompted to confirm the deletion, so make sure you really want to remove it.

**Important!** It will not be removed from the database and will still be included on other Portal pages. It will **ONLY** be removed from the My Watch List

If results from technologies other than vibration exist, they are listed. Included is the date the report was posted to the Portal and the severity assigned to it by the person uploading it.

Machines monitored via the WATCHMAN Online System are identified.

Machine Name	Location	Icon	Last Reviewed Vibration Status	Date	Other Test Results
Chiller #2	Northeast First Avenue	🔴	SERIOUS	7/18/2018 7:25 PM	
PUMP B	Indianapolis Main Plant	🟡	MODERATE	7/8/2018 9:02 PM	Motor Testing: <b>EXTREME</b> (Date: 5/24/2018 12:50 PM) Thermography: <b>SLIGHT</b> (Date: 7/29/2018 5:35 PM) Oil Analysis: <b>SERIOUS</b> (Date: 7/5/2018 1:15 PM)
CP-79	Linham Compressors	🖥️	MODERATE	4/21/2018 5:52 AM	New Data Pending Review: 7/13/2018 12:30 AM Expert System Results : <b>OK</b>

Machines monitored via the WATCHMAN Online System show both the **Last Reviewed Vibration Status** and the latest **Expert System Results**. The icon color represents whichever is newer. This is because online-monitored machines have data collected frequently (for example, 2x per day) and an Analyst generally reviews on a schedule (for example, monthly) and/or when the expert system detects a notable change in condition.

# Adding Machines to My Watch List

Use either of the following methods to add a machine to the Watch List. Until you add at least one machine to the list, it will be empty.

Only machines from which data has been collected can be added. Machines that have never been tested will not appear in the Watch List.

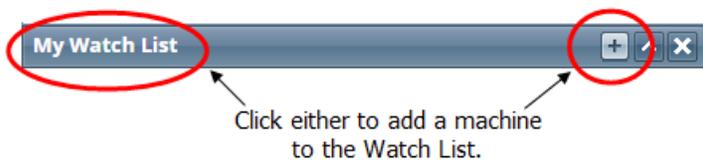
## Adding a Machine from the Machine Details Page

When on the Machine Details page, click the plus sign next to the machine's name (+) to add it to your Watch List. If no plus sign is visible, it means the machine is already on your Watch List.

The screenshot shows a machine details page. At the top, a grey header reads "Plant: East - Area: BASEMENT". Below this, the machine name "Main Air Compressor" is displayed with a plus sign (+) to its right. Underneath the name is a red icon of a compressor and a red status box that says "Status: EXTREME (Vibration Analysis)". A red banner below the machine name contains the text "Analysts Reviewed Results" and "Data Acquired: 11/17/2016 6:58 PM". Below the banner are two rows of colored boxes representing test dates: "Last Monthly Test" and "Maximum Severity Test". At the bottom, there is a section for "Recommended Actions" with the text "DESIRABLE: Check for inlet flow restriction".

## Adding Machines from the Dashboard

1. Choose **View>Dashboard**. If the Dashboard is your default home page, you can also click the WATCHMAN Portal (or your company logo if your Portal is customized) in the upper left of the banner.
2. Click either the **My Watch List** label or the + in the My Watch List section heading.



- From the **Plant** drop-down list, select the plant in which the machine you want to add resides.

**My Watch List**

Select Machine(s) to Add to My Watch List

**Plant**  
Select Plant

**Current Selection**

Add To My Watch List

- From the **Area** drop-down list, select the area in which the machine you want to add resides. This drop-down list is dynamic, so only the areas within the plant you selected in the previous step appear.

**My Watch List**

Select Machine(s) to Add to My Watch List

**Plant**  
Blackstone

**Area**  
Select Area

**Current Selection**  
Blackstone

Add To My Watch List

- From the **Machine** drop-down list, select the machine you want to add to the Watch List, then click the **Add to My Watch List** button.

**My Watch List**

Select Machine(s) to Add to My Watch List

**Plant**  
Blackstone

**Area**  
Gas Compressors

**Machines**  
Use the Shift or Ctrl key to add multiple machines.  
Gas Compressor 2

**Current Selection**  
Blackstone - Gas Compressors  
Gas Compressor 2

Add To My Watch List

**Note:** It is possible to select multiple machines at once. Hold *Shift* or *Ctrl* and use mouse or keyboard to add multiple machines to My Watch List.

- Verify that the item you added appears in the My Watch List section of the Dashboard.

# Program View

Program View provides a tree structure view of your entire monitoring program – across all of the plants to which your login has permission. You can click a plant in the tree on the left side of the page or in the table (in the main area) to drill-down to more information about the monitoring activities within it.

**Select the Plant:**

- Industry Vertical - Air Separation
- Industry Vertical - Chemicals
- Industry Vertical - Oil and Gas
- Industry Vertical - Pharmaceutical and Biotech
- Industry Vertical - Pipelines
- Industry Vertical - Power Generation

**Program View - Vibration Analysis**

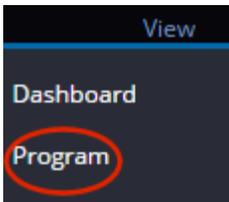
Filter By :

Plant Name	Extreme	Serious	Moderate	Slight	No Faults Detected	Never Tested	Total Machines	New Data Arrived
Industry Vertical - Air Separation	1	0	0	0	3	1	5	2
Industry Vertical - Chemicals	1	0	1	1	1	0	4	2
Industry Vertical - Oil and Gas	0	0	1	3	0	0	4	1
Industry Vertical - Pharmaceutical and Biotech	0	0	3	1	0	0	4	0
Industry Vertical - Pipelines	0	0	3	1	0	0	4	2
Industry Vertical - Power Generation	0	0	1	0	3	0	4	0

This gives a different perspective from the Dashboard, which is element-based in its information display.

You can change to Program View at any time by doing either of the following:

Select **Program** from the **View** menu in the top banner.



Click **Plants** in the Navigation Section.



# Setting Program View as Home Page

If you would rather Program View be your default view when you log in (instead of the Dashboard), you can change it in your preferences.

1. Choose **Preferences>User**.

**Note:** If you are a DBManager, Analyst, or Administrator, a list of all logins with access to the database appears. Locate the user whose home page you want to change (yours or someone else's) and click the **Edit User** button to open the User Configuration page for that login.

2. From the **Home Page Option** drop-down list, select **Program View Page**.
3. Click the **Update** button.

The screenshot shows the 'User Configuration' interface for editing Joe Jones. On the left, there is a sidebar with a user icon and links for 'Username', 'User Configuration', and 'Email Notifications'. The main area is titled 'User Configuration' and 'Editing Joe Jones'. It contains several form fields: 'Name' (Joe Jones), 'Username' (jjones), 'Phone' (781-123-4567), 'Email' (jjones@YourCompany.com) with a 'Test' button, 'Password' (masked with dots), and 'Confirm Password' (masked with dots). The 'Home Page Option' dropdown is highlighted with a red circle and currently shows 'Program View Page'. Below it are 'Time Zone' (GMT-05:00 Eastern Time (US & Canada)) and 'Language' (English-US) dropdowns. At the bottom, there are links for 'Email Notifications' and 'User Privileges', and 'Update' and 'Cancel' buttons.

# Email Notifications

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The WATCHMAN Reliability Portal can notify you of events you are interested in, such as when an online-monitored machine's health changes or when an analyst posts a new diagnostic report.

Each user can configure the Portal to send them email notifications about the events that are important to them. There are many types of notifications:

- **Machine Health Status Notifications** - Configure this type of notification to get an email when the status of a machine is set to a specific state (for example, to **Serious** or **Extreme**). For machines from which vibration data is collected with a TRIO, the email is sent based on Analyst Reviewed Results. For online machines, email notifications are based on Expert System Results posted to the master database at the WATCHMAN Data Center.
- **New Report Notifications** - Configure this type of notification to get an email when a new report is posted to the Portal. You can also specify that the report be attached to the email.
- **Reminders for Collection & Reporting** - These "reminder" notifications are sent when data collection and/or reporting is due or overdue.
- **New Data Arrived Confirmations** - This type of notification sends an email when new data is uploaded to the WATCHMAN Data Center for analysis.

When setting up email notifications, you can also specify whether you want them for all plants to which your login has permission or only for certain plants.

Any Portal user can set up and/or edit his or her own Email Notifications. DBManagers, Analysts, and Administrators can set up or edit the Email Notifications of other users.

## Email Notifications of Joe Jones



**Active?**  **Description:**  **Email:**  **Email Format:** **Text**  **HTML**

**Vacation Mode (no emails sent)**

<b>Online Collection</b> <ul style="list-style-type: none"><li><input checked="" type="radio"/> No Email Notifications</li><li><input type="radio"/> BLUE - Slight or greater</li><li><input type="radio"/> YELLOW - Moderate or greater <small>(High ALERT &amp; Low ALERT Process Point/Overall Alarms)</small></li><li><input type="radio"/> ORANGE - Serious or greater <small>(High Critical &amp; Low Critical Process Point/Overall Alarms)</small></li><li><input type="radio"/> RED - Extreme</li></ul>	<b>Reviewed TRIO Test Results</b> <ul style="list-style-type: none"><li><input checked="" type="radio"/> No Email Notifications</li><li><input type="radio"/> All Email Notifications</li><li><input type="radio"/> BLUE - Slight or greater</li><li><input type="radio"/> YELLOW - Moderate or greater</li><li><input type="radio"/> ORANGE - Serious or greater</li><li><input type="radio"/> RED - Extreme</li></ul>	<b>Reports</b> <ul style="list-style-type: none"><li>Analyst Report <input type="checkbox"/></li><li>Attach Report <input type="checkbox"/></li></ul>
--	---	---

**Apply Reminders to:**

**Select Reminders**

- Report Due
- Data Collection Due
- New Data Arrived\*
- Report Overdue/Done
- Data Collection Overdue/Done

\*For non-Azima DLI data collectors, only the uploading user receives notification.

**Recurring email messages**  
Send recurring Overdue email messages with the frequency of  days

- All Plants
- Select Plants
- Select/Unselect All

- Cambridge
- Memphis
- Milford

# Setting Up Email Notifications

The Email Notification page lets you specify the email address(es) to which you want notifications sent, as well as the types of notifications you want to receive. Setting up email notifications is a multi-step process:

1. Specify the email address(es) to which email notifications should be sent.
2. Select the health status at which you want to be notified.
3. Specify whether you want to be notified when a new report is posted to the Portal and, if so, whether you want it attached to the email.
4. Set up collection and reporting reminder emails to help manage your PdM program.
5. Specify whether you want to be notified when new data arrives at the WATCHMAN Data Center for analysis.
6. Identify the plants for which you want to receive notifications.
7. Click the **Save** button at the bottom of the page to commit your selections.

Each section of the Email Notifications page is described on the following pages.

# Specifying Where Email Notifications Are Sent

Email notifications are tied to your user login and are sent to the email address(es) you specify.

In most cases, you will set up your own email notifications. However, DBManagers, Analysts, and Administrators can set up notifications for other users.

**Important!** Only enter email addresses related to the user whose notifications you are setting up. You can always tell whose notifications you are working on because the top of the page will say "Email Notifications of..."

## To specify where email notifications are sent:

1. From the top navigation bar choose **Preferences>User**.
2. Do one of the following, depending on whether you want to specify email notifications for your own login or for someone else's (if you have permissions to do so).
  - To set up email notifications for yourself, click the **Email Notification** link on the left side of the page. This ALWAYS opens the Email Notifications of the currently logged in user, regardless of whose information is being configured in the main (right) section.

The screenshot shows a web interface for user configuration. On the left, a sidebar contains a user profile icon, the username 'jjones', and navigation links for 'User Configuration' and 'Email Notifications' (the latter is circled in red). The main area is titled 'User Configuration' and contains a form for 'Editing Joe Jones'. The form fields are: Name (joe Jones), Username (jjones), Phone (empty), Email (dharn@azimadli.com with a Test button), Password (masked with dots), Confirm Password (masked with dots), Home Page Option (Dashboard Page), Time Zone (GMT-05:00 Eastern Time (US & Canada)), and Language (English-US). At the bottom of the form are 'Update' and 'Cancel' buttons.

- If you are a DBManager, Analyst, or Administrator, you can set up email notifications other users. Locate the user from the list of logins, click the **Edit User** button, and then click the **Email Notifications** link at the bottom of the User Configuration page. (This link does not appear for general "Users." General users can only access their email notifications via the link to the left, as explained above.)

**User Configuration**

**Editing Joe Jones**

**Name:**

**Username:**

**Phone:**

**Email:**

**Password:**

**Confirm Password:**

**Make user INACTIVE - No access to the Portal**

**Home Page Option:**

**Time Zone:**

**Language:**

3. At the top of the Email Notifications page, enter the email to which you want notifications sent.
  - a. In the **Description** box, enter a description of the contact (for example, office).
  - b. In the **Email** box, enter the address associated with this contact (for example, your corporate email address).
  - c. Select the **Active** check box at the beginning of the row to turn on email notifications for this contact. If you do not select this check box, this contact will not receive email notifications.
  - d. Select either the **Text** or **HTML** option button to specify how you want the emails formatted when they are sent. (Most users select **HTML**.)
4. Click **Add**. The information you just entered creates a new row below the boxes.

- Repeat Steps 3-4 for each email address to which you want notifications sent -- for example, your corporate and personal email addresses. DO NOT enter email addresses for *other* users. If you are setting up notifications for a user other than yourself, be sure to only enter emails for *that* user.

**Email Notifications of Joe Jones**

Active?	Description:	Email:	Email Format:		Test	Add
			Text	HTML		
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/>	<input checked="" type="radio"/>		
<input checked="" type="checkbox"/>	Office	joe@yourcompany.com	<input type="radio"/>	<input checked="" type="radio"/>	Edit	Delete

Vacation Mode (no emails sent)

**Tip!** To delete a contact, click the **Delete** button next to it. This button appears when a contact has been added. You can also edit an existing contact (for example, to change an email address or to make it inactive) by clicking the **Edit** button.

## Machine Health Status Notifications

Once you have added at least one email address and deemed it "active," you can specify the machine health status notifications that you want to receive.

### Online Collection

- No Email Notifications
- BLUE - Slight or greater
- YELLOW - Moderate or greater  
(High ALERT & Low ALERT Process Point/Overall Alarms)
- ORANGE - Serious or greater  
(High Critical & Low Critical Process Point/Overall Alarms)
- RED - Extreme

### Reviewed TRIO Test Results

- No Email Notifications
- All Email Notifications
- BLUE - Slight or greater
- YELLOW - Moderate or greater
- ORANGE - Serious or greater
- RED - Extreme

### Online Collection

This section only appears if your program includes machines that are monitored online by the WATCHMAN Online System. These machines have data collected automatically via a SPRITE data acquisition device; not with a TRIO portable vibration data collector.

### Online Collection

- No Email Notifications
- BLUE - Slight or greater
- YELLOW - Moderate or greater  
(High ALERT & Low ALERT Process Point/Overall Alarms)
- ORANGE - Serious or greater  
(High Critical & Low Critical Process Point/Overall Alarms)
- RED - Extreme

Select an option button to specify the health status at which you want to be notified. For example, if you select the **ORANGE - Serious or greater** option button, you will receive an email notification whenever a machine status changes to **Orange - Serious** or worse (**Red - Extreme**). You also have the option of selecting **No Email Notifications** so that you do not receive any status change emails.

These notifications are based on when the WATCHMAN Online System posts updated health information to its master database at the WATCHMAN Data Center. The timing of these updates varies by the needs of each customer. For example, some facilities may post updated machine health once per day on a schedule and anytime the system detects a machine health status change that remains steady for more than a specified set of time.

How your WATCHMAN Online System program is configured usually depends on the number of machines in the program and their criticality to production. Keep in mind that Portal email notifications are tied directly to these configuration settings. For example, if your WATCHMAN Online System only posts updated health statuses once per day and a machine state changes *after* that day's posting, you will not receive notification of the change until the *next* day.

Online collection notifications are also triggered by process point and overall alarm set in the database.

### **Reviewed TRIO Test Results**

For machines from which data is collected with a TRIO data collector, select an option button to specify the health status at which you want to be notified.

#### **Reviewed TRIO Test Results**

- No Email Notifications**
- All Email Notifications**
- BLUE - Slight or greater**
- YELLOW - Moderate or greater**
- ORANGE - Serious or greater**
- RED - Extreme**

For example, if you select the **ORANGE - Serious or greater** option button, you will receive an email notification whenever the Analyst Reviewed Result for a machine is **Orange - Serious** or worse (**Red - Extreme**). You also have the option of selecting **No Email Notifications** so that you do not receive any notification emails.

**Important!** The **Reviewed TRIO Test Results** notification is ALWAYS based on Analyst Reviewed Results.

This email can include links to an Asset Health Viewer for each machine so you can see detailed machine health information without logging in to the Portal. This feature must be turned on for your database. Contact Azima Technical Support for more information.

# New Report Notifications

Use the **Report** settings to specify whether you want to be notified when a new report is posted to the WATCHMAN Reliability Portal and, if so, whether you want it to be attached to the email notification.

## Reports

Analyst Report

Attach Report

- Select the **Analyst Report** check box to receive emails when a new report is posted.
- Select the **Attach Report** check box to have the report attached to the email notification.

Reports are posted to the Portal in two ways -- from the Portal and from ExpertALERT-Cloud.

Any user can post a report directly from the Portal. However, only those with an ExpertALERT-Cloud subscription can post reports from the diagnostic software at the WATCHMAN Data Center.

If you select the **Analyst Report** check box, you will receive a notification regardless of how a report is posted, as long as your login has permission to the plant/area about which the report is about and you have not excluded the plant/area from receiving email notifications.

**Note:** Whether an email is sent depends on whether the person posting it selected the **Send Email alerts** check box. If they do, you will only receive it if the Analyst Report check box is selected via your Email Notifications.

# Data Collection & Reporting Notifications

The Reminder section lets you specify the reporting and collection activities you want to be notified about.

For most customers, reminder notifications are applied on the plant level. (The **Apply Reminders to** setting is configured in advance by Azima and cannot be changed via the Email Notification page by any user, even Administrators. If you believe it should be at a different level, contact Azima.)

If your **Apply Reminders to** setting is set to **Plants**, it means reminder notifications will cover an entire plant-- including all areas within it. Reminders are only sent for the plants you specify (explained below).

Apply Reminders to:

**Select Reminders**

<input type="checkbox"/> Report Due	<input type="checkbox"/> Data Collection Due	<input type="checkbox"/> New Data Arrived*
<input type="checkbox"/> Report Overdue/Done	<input type="checkbox"/> Data Collection Overdue/Done	

\*For non-Azima DLI data collectors, only the uploading user receives notification.

**Recurring email messages**

Send recurring Overdue email messages with the frequency of  days

Select the check boxes of the events for which you want to receive an email notification:

- **Report Due.** This email reminder is sent when a specific percentage of machines has had data collected within the specified collection period. The percentage that triggers this notification is set in advance by Azima at the WATCHMAN Data Center. For example, a Report Due email may be sent when 80% of the machines in the plant had data collected. Note that if this percentage is not hit prior to the end of the collection period, a Report Due email *is not* sent.
- **Report Overdue/Done.** Once a Report Due email is sent, the analyst has a specific number of days to review the data and post a report. (This time span is based on the customer's contract and specified in advance by Azima at the WATCHMAN Data Center.) If a report is not posted by the deadline, a Report Overdue reminder email is sent the day after the due date. A Report Done email is only sent if a Report Overdue was sent -- the Report Done email lets you know that the report has been posted.

**Important!** If a report is posted within the allotted time frame (that is, you never receive a Report Overdue notification), you will only receive notification of the new report if you have set up new report notifications.

- **Data Collection Due.** This reminder is sent when a specific percentage of machines have not had data collected within the collection period. The percentage that triggers this reminder is set in advance by Azima at the WATCHMAN Data Center.
- **Data Collection Overdue/Done.** If the specified percentage of machines has not had data collected by the end of the collection period, a Data Collection Overdue reminder email is sent one day after the collection period. A Data Collection Done email is only sent if a Data Collection Overdue reminder was sent - the Data Collection Done email lets you know when the specified percentage of machines has had data collected.

**Tip!** Data must be synchronized to the WATCHMAN Data Center for the Portal to know that collection is complete. If data is collected, but not synchronized (replicated), the Portal considers the data NOT collected since the new data is not in the database at the WATCHMAN Data Center.

If you want email notifications to be sent on a recurring basis for overdue events, enter a number of days in the **Send recurring Overdue email messages...** box to have subsequent overdue notices sent.

## New Data Arrived Notifications

This reminder is sent when new data is inserted into the ExpertALERT database at the WATCHMAN Data Center.

To receive this type of notification, select the **New Data Arrived** check box.

**Note:** A New Data Arrived notification only triggers a Report Due notification if the received data brings the total percentage of machines from which data has been collected to the value specified by Azima at the WATCHMAN Data Center.

Apply Reminders to:

**Select Reminders**

<input type="checkbox"/> Report Due	<input type="checkbox"/> Data Collection Due	<input type="checkbox"/> <b>New Data Arrived*</b>
<input type="checkbox"/> Report Overdue/Done	<input type="checkbox"/> Data Collection Overdue/Done	

\*For non-Azima DLI data collectors, only the uploading user receives notification.

**Recurring email messages**

Send recurring Overdue email messages with the frequency of  days

## Restricting Email Notifications by Plant

The very bottom of the Email Notification page is where you specify the plants for which you want to receive notifications. Only plants to which your login has permission are listed. (If your **Apply Reminders to** option is set to **Area**, you will see a list of areas instead of plants.)

- Select the **All Plants** option button to receive notifications for all of the plants. If you select this option button, the list of plants disappears.
- If you only want notifications for certain plants, select the **Select Plants** option button and then select the check boxes for the plants you want.

**Tip!** If your program includes a lot of plants, you can use the **Select/Unselect All** check box to toggle on or off all of the plant check boxes to make selection easier.

**All Plants**                       **Select Plants**                       **Select/Unselect All**  
 Cambridge  
 Memphis  
 Milford

Save

Back

# Stopping Email Notifications

The email notifications that are sent automatically by the WATHMAN Portal can be adjusted, stopped temporarily, or stopped permanently.

Any user can stop his or her own notifications. Only DBManagers, Analysts, and Administrators can stop notifications for other users.

## Temporarily Stop Email Notifications

Access the Email Notifications page for the user whose notification you want to temporarily stop and then do one of the following:

- If you are going on vacation and want to halt all emails, but retain your settings for when you return, select the **Vacation Mode (no emails sent)** check box and then click **Save**. This stops all email notifications to all of the email addresses on the Email Notifications page, regardless of whether the **Active** check box is selected for a contact. Upon your return, clear this check box to have emails resume per your settings.

### Email Notifications of Joe Jones

Active?	Description:	Email:	Email Format:		Test	Add
			Text	HTML		
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/>	<input checked="" type="radio"/>		
<input checked="" type="checkbox"/>	Office	joe@yourcompany.com	<input type="radio"/>	<input checked="" type="radio"/>	Edit	Delete
<b>Vacation Mode (no emails sent)</b> <input checked="" type="checkbox"/>						

- If you want to temporarily stop email to a particular email address, click the **Edit** button next to that contact and clear the associated **Active** check box. Click **Update** and then **Save** to apply the change. (The **Edit** button turns to an **Update** button when the contact is able to be edited.)

## Permanently Stop Email Notifications

Click the **Delete** button to remove the contact to which you want to permanently stop email notifications.

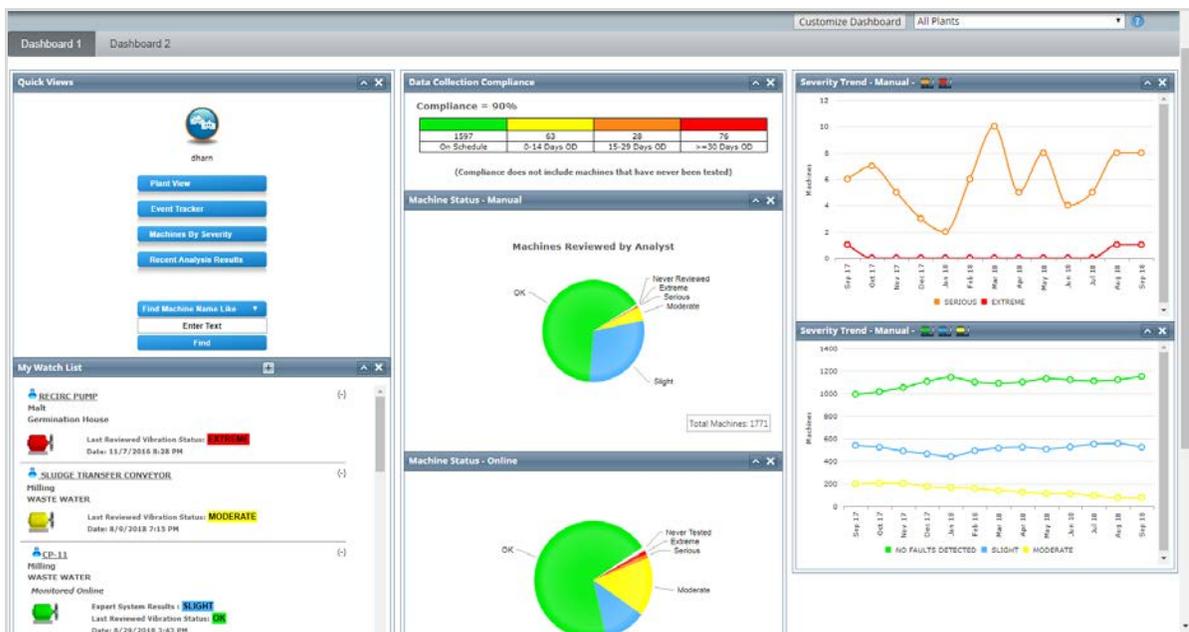
# Accessing Reports from Your Analyst

Whenever your analyst posts a diagnostic report, it is accessible from the WATCHMAN Reliability Portal. There are multiple ways to access analyst reports. The most direct way is from the Dashboard (as explained next).

**Note:** [All of the ways to access reports](#) are covered on page 41. In addition to analyst reports, all reports posted to the Portal (oil reports, machine specs, etc.) are accessed the same way.

## Accessing Analyst Reports from the Dashboard

1. Log in to the WATCHMAN Reliability Portal. (See page 2 if you need help.)
2. On the Dashboard, ensure the plant for which you want to view analyst reports is selected from the drop-down list on the upper right part of the page. If it is not, select it. (If you have access to more than one plant and want to see reports from all of the plants to which your login has permission, select **All Plants**, as shown in the image below.)



3. Click the **Recent Analysis Results** button to see the 20 most recent reports posted about the selected plant (or in the case shown here, of **All Plants**).



- Review the analyst reports listed and then click the **Report Description** for the report you want to see.

The list includes a description of the report and the date/time it was uploaded to the Portal (using the time zone specified in your preferences) so you can easily identify the report you want. The **Report Description** is color-coded based on the importance assigned to it by your analyst when he or she uploaded it to the Portal.

**Tip!** If you want to see all reports for this plant and not just the last 20, click the **View All Reports** button.

**Recent Reports (Last 20)** Filter By :

[View All Reports](#)

Point Name	Report Description	Date Added	Plant/Area/Machine/ Survey Name
Monthly Vibration Reports	<a href="#">December 2017 Vibe Report</a>	12/11/2017 3:31:48 PM	Bellingham
Monthly Vibration Reports	<a href="#">November 2017 Vibe Report</a>	11/18/2017 3:38:36 PM	Bellingham
Monthly Oil Reports	<a href="#">Nov/Dec 2017 Oil Report</a>	11/21/2017 2:22:55 PM	Bellingham
Monthly Oil Reports	<a href="#">Sept/Oct 2017 Oil Report</a>	10/11/2017 1:33:31 PM	Bellingham
Monthly Vibration Reports	<a href="#">October 2017 Vibe Report</a>	10/12/2017 6:29:56 PM	Bellingham
Specific Machine Vibration Reports	<a href="#">Compressor 23 Special Vibe Report</a>	9/11/2017 4:54:53 PM	Blackstone
Vibration Reports	<a href="#">August 2017 Vibration Report</a>	8/10/2017 1:37:18 PM	Milford <b>Area:</b> Peaking Plant
Monthly Vibration Reports	<a href="#">May 2017 Vibration Report</a>	5/11/2017 3:33:23 PM	Blackstone <b>Area:</b> Gas Compressors
Monthly Vibration Reports	<a href="#">April 2017 Vibration Report</a>	4/12/2017 5:05:48 PM	Blackstone <b>Area:</b> Gas Compressors

« [First](#) 1 [2](#) [Last](#) »

The **Point Name** column shows the type of report. This makes it easy to identify the different types of PdM reports (oil, vibration, etc.).

5. The report opens in a new window. Print or save it to your local computer (if needed).

The screenshot displays the Azima logo at the top right, consisting of the word "AZIMA" in blue and a yellow power button icon. Below the logo, the title "PERIODIC MACHINE VIBRATION ANALYSIS REPORT" is centered in blue. To the right, under the heading "PREPARED FOR:", the text "ABC Power Company", "Cambridge", and "10/23/2017" is listed. The main content area features a blue, wavy, abstract graphic representing vibration data. Below this graphic, a red text prompt reads: "You may need to mouse over the report to see these controls." At the bottom, a dark grey control bar contains several icons: a save icon (floppy disk), a print icon, a home icon, a back icon, a page indicator "1 / 4", a minus sign, a plus sign, and a document icon. A red circle highlights the save and print icons. In the bottom left corner, a small black box displays the dimensions "8.50 x 11.00 in".

# Alternative Methods for Viewing Reports

Analyst reports can be accessed in the following ways:

From this page:	Do this to see reports posted:
<p><b>Program View</b> (Choose <b>View&gt;Program</b>)</p>	<p>To see the 20 most recent reports in the database, click the <b>Recent Reports in Database</b> link in the Reports Section on the bottom left of the page.</p>  <p>The screenshot shows a 'Reports' section with a horizontal line above it. Below the line are four links, each with an icon: a calendar for 'Recent Reports in Database', an upward arrow for 'Machines in Database by Severity', a warning triangle for 'Overdue Machines in Database', and a checkmark for 'Event Tracker in Database'. The first link is circled in red.</p>
<p><u><a href="#">Plant View</a></u> (Select a plant from the tree structure in the Navigation Section.)</p>	<p>To see the 20 most recent reports about a plant, click the <b>Recent Reports in Plant</b> link in the Reports Section on the bottom left of the page.</p>  <p>The screenshot shows a 'Reports' section with a horizontal line above it. Below the line are five links, each with an icon: a calendar for 'Recent Reports in Plant', an upward arrow for 'Machines in Plant by Severity', a person for 'Analyst Review Required in Plant', a warning triangle for 'Overdue Machines in Plant', and a checkmark for 'Event Tracker in Plant'. The first link is circled in red.</p>
<p><u><a href="#">Area View</a></u> (Select an area from the tree structure in the Navigation Section.)</p>	<p>To see the 20 most recent reports about an area, click the <b>Recent Reports in Area</b> link in the Reports Section on the bottom left of the page.</p>  <p>The screenshot shows a 'Reports' section with a horizontal line above it. Below the line are five links, each with an icon: a calendar for 'Recent Reports in Area', an upward arrow for 'Machines in Area by Severity', a person for 'Analyst Review Required in Area', a warning triangle for 'Overdue Machines in Area', and a checkmark for 'Event Tracker in Area'. The first link is circled in red.</p>

# Creating Your Own Custom Reports

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The WATCHMAN Reliability Portal lets you create your own Custom Reports containing the plants, areas, machines, or surveys you want. They are created on-the-fly directly from the Portal and can be saved to your local computer, printed, and/or posted to the Portal for others to see.

If you plan save a Custom Report, it is saved as a PDF. You and anyone to whom you plan to distribute it must have a PDF reader, such as the free Adobe Reader, in order to view the file.

## To create a Custom Report

1. From any Portal page, click the **Create Custom Report** link in the top banner.



**Important!** The first time you click this link, you may see a message about ActiveX control not being installed or enabled. If you do, you should install/enable ActiveX.

2. In the Select Report Format section, select the **Custom** option button.

**Note:** There are other types of reports you can create, including a Standard Report, Compound Risk Index Report, and Derived Machinery Readiness Report. To learn more about these other reports, see the Portal's online help.

### Create Custom Report

**Select Report Format**

**Standard**

**Custom**

**Composite Risk Index \***

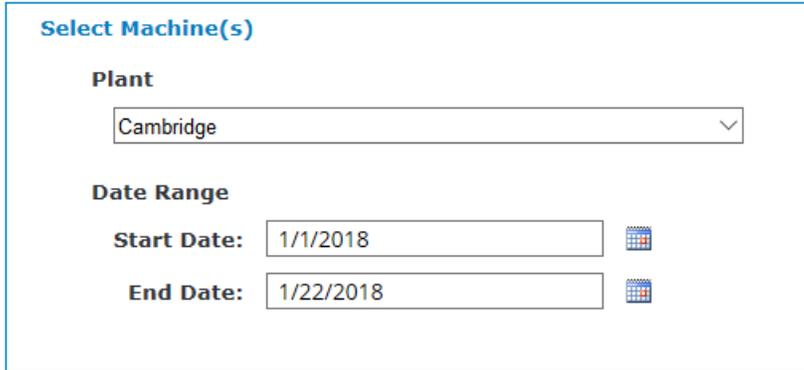
**Derived Machinery Readiness \***

\* Includes all machines in the database unless a plant or area is selected.

3. Specify the machines you want included in the report. You can generate a report containing all of the machines in a particular plant or area, on a survey, or for a single machine.

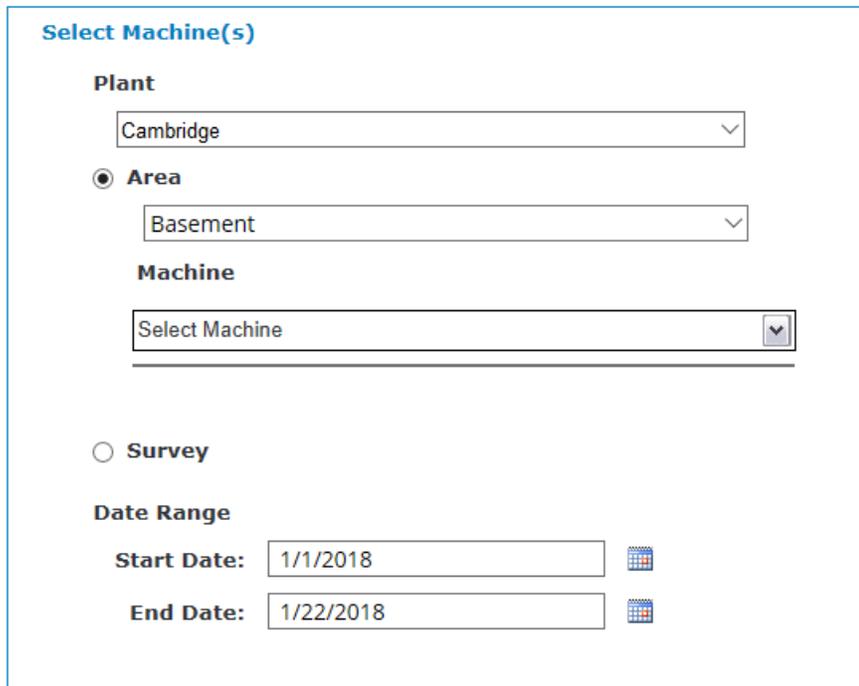
**Note:** The following steps explain how to create a Custom Report for a single machine. At any point, click the **Get Report** button to generate the report – for example, after you select a plant to have all machines in that plant included.

- a. From the **Plant** drop-down list, select the plant containing the machine(s) you want.



The screenshot shows a form titled "Select Machine(s)". Under the heading "Plant", there is a dropdown menu with "Cambridge" selected. Below this, under "Date Range", there are two input fields: "Start Date" with the value "1/1/2018" and "End Date" with the value "1/22/2018". Each date field has a small calendar icon to its right.

- b. Select either the **Area** or **Survey** option button, depending on whether you want the report based on machines in an area or on a survey. In the image below, **Area** is selected, so you must then use the **Area** drop-down list to select the area containing the machines you want included in the report.



The screenshot shows the same "Select Machine(s)" form. The "Area" radio button is now selected, and a dropdown menu below it shows "Basement" selected. Below that, there is a "Machine" dropdown menu with "Select Machine" selected. The "Date Range" section remains the same with "Start Date" as "1/1/2018" and "End Date" as "1/22/2018".

- c. From the **Machine** drop-down list, select the machine you want included in the Custom Report.

### Select Machine(s)

**Plant**

**Area**

**Machine**

**Survey**

**Date Range**

**Start Date:**  

**End Date:**  

4. In the **Start Date** and **End Date** boxes, enter the date range of the data you want included in the report.
5. In the Report Options section, select the features you want included in the report. This list of check boxes varies depending on whether you are basing the report on a plant, area, or survey. You do not have to select any check boxes if none of the features are required for your report.

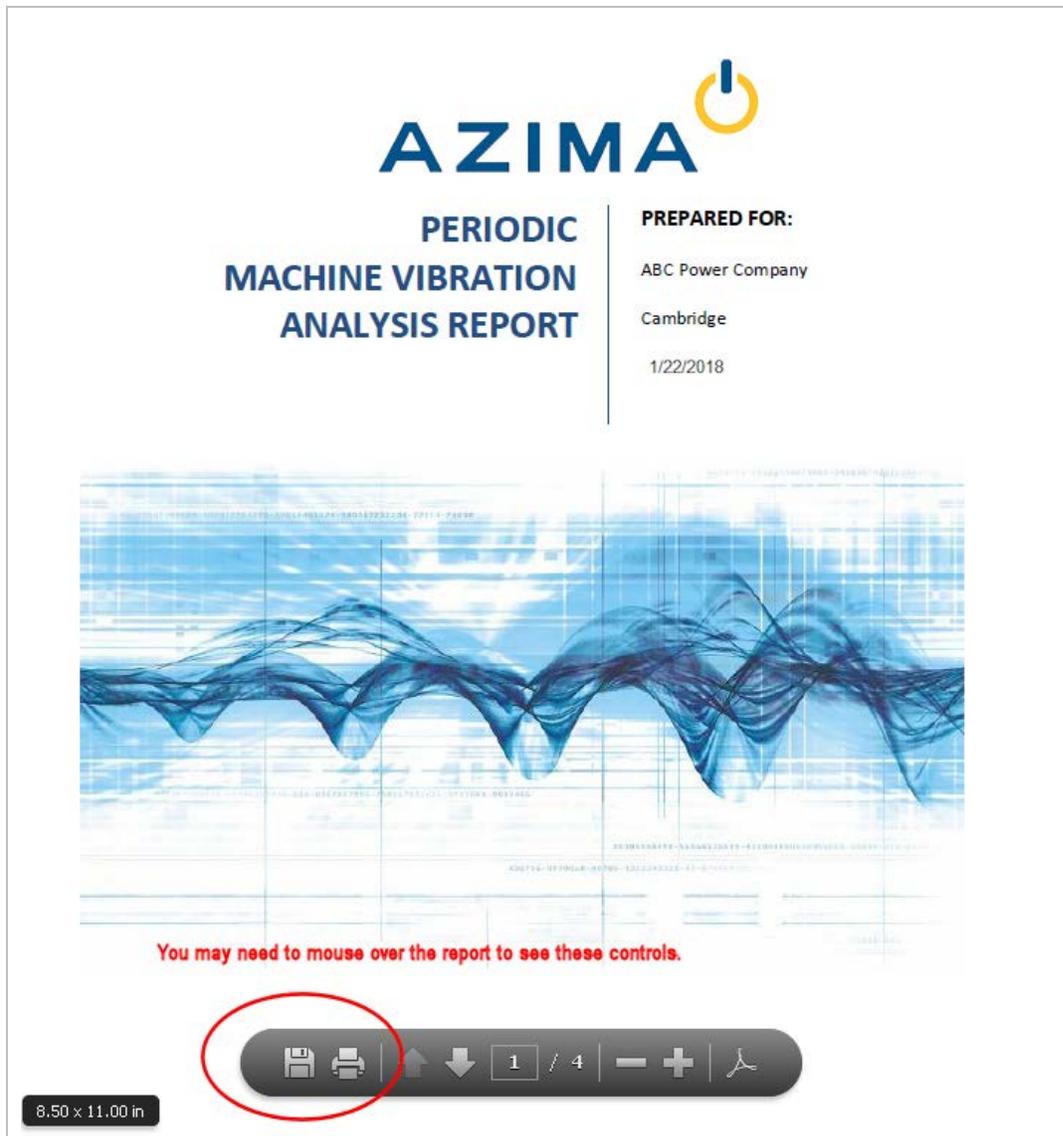
### Report Options

- Include Machines with Slight Faults**
- Area info as Plant (on Cover page)**
- Include Spectral Graphs -Double Triax**
- Include Machine Image**
- Include Max Level**
- Include Cited Peaks**
- Group Summary by Area**

6. Click the **Get Report** button to the right of the options.

7. Wait while the report is generated. Once displayed, you can do any of the following. You may need to mouse-over the report to see these icons.
  - To print the report, click the **Print** icon. If you have a printer installed, the Print dialog box will open so that you can print the report. (You must have a printer installed in order to print the report.)
  - To save the report, click the **Save** icon and specify a location on your local computer to save it.
  - To post the report to the Portal, click the **Save** icon, specify a location on your local machine to save it, and then follow post it to the Portal. See the online help to learn how to post a PDF to the Portal.

**Note:** If you do not want to print or save the report, you can review it and then close it. It will not be saved.



# Getting Help

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This guide contains information that will help you get started with the WATCHMAN Reliability Portal. If you run into any issues that you cannot solve with the information found in this document or the Portal's online help, Technical Support can be reached using the methods described below.

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## Visit the Azima Resource Center

Visit our Resource Center at: <http://knowledge.azimadli.com>

Here you will find knowledgebase articles and other helpful information about Azima products and services.

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## Email Technical Support

Send an email to an Azima Support Team member at: [support@AzimaGlobal.com](mailto:support@AzimaGlobal.com)

Alternatively, you can click the **Email Our Support Team** icon on the login page to request assistance.

Be sure to include detailed description of the issue, including what lead up to the trouble and any error messages you encountered.

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## Launch a Chat Session

If your system supports it, you can chat online with a technical support specialist by clicking the **Chat Live with an Expert** icon on the login page (<https://www.WatchmanPortal.com>).

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## Call Us

Dial +1-800-654-2844 for live Technical Support between 9am and 7pm Eastern Time, Monday through Friday. Users outside the continental United States must call +1-206-842-7656.

If you need help outside of these hours, leave a detailed message and a support expert will return your call at the first opportunity.

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