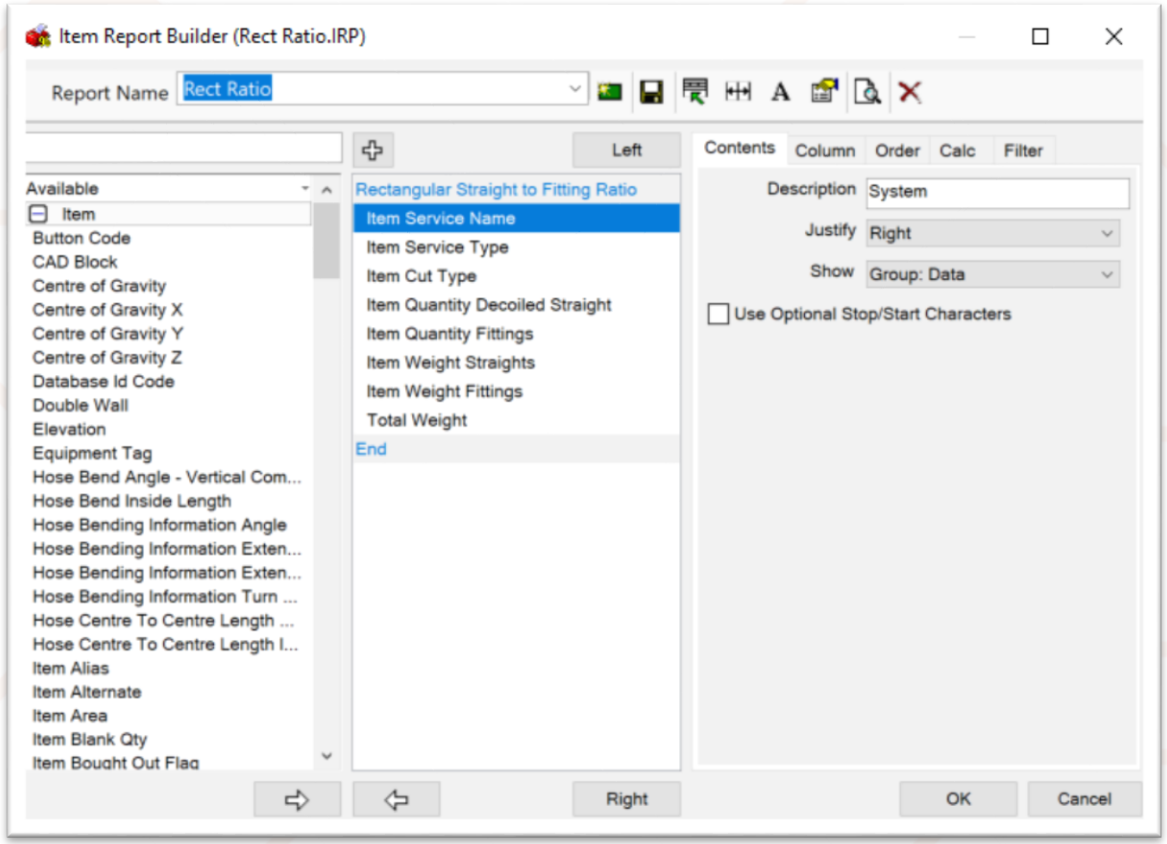
Applied Software®

CUSTOMIZED FABRICATION REPORTING - PART 2

SHAWN HILGARTNER, SENIOR FABRICATION SPECIALIST
APPLIED SOFTWARE

ITEM REPORT BUILDER

Opening the **Item Report Builder**

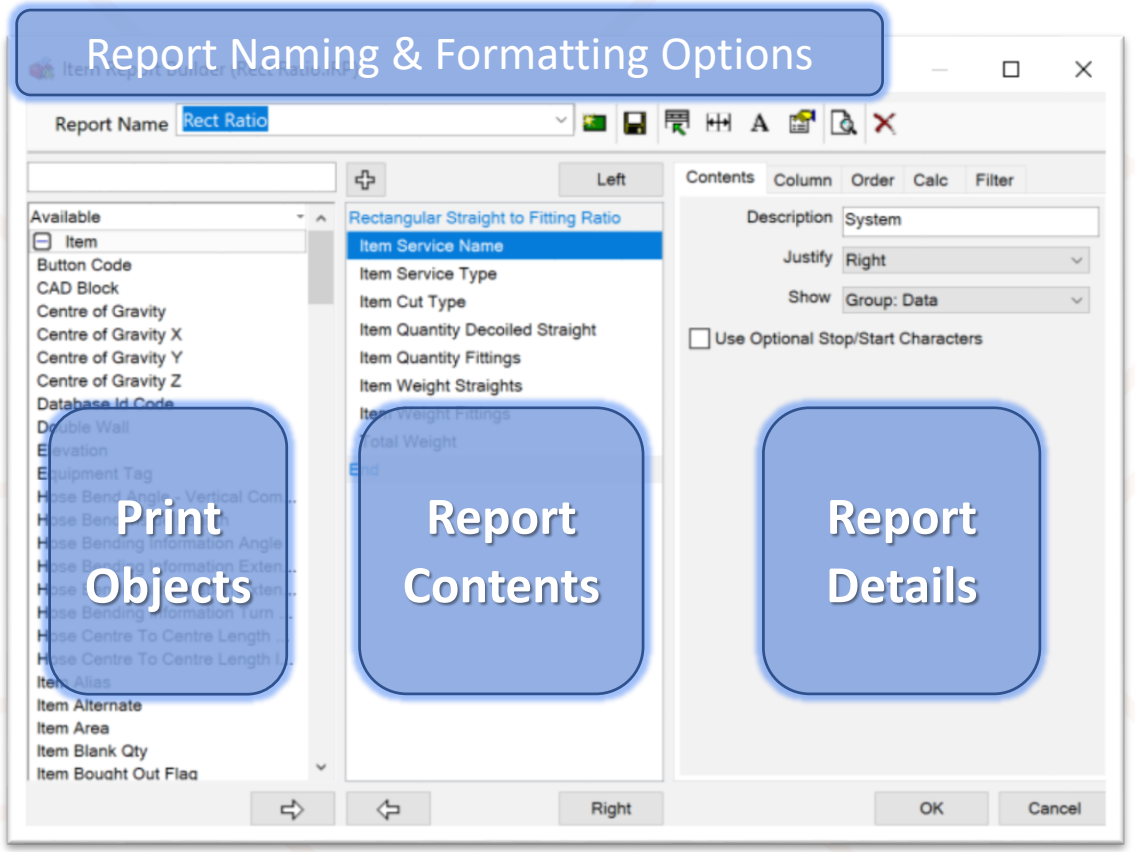


- Open ESTmep or CAMduct and go to **File** --> **Print Layout** --> **Item Reports**.
- CADmep users can type **REPORTS** at the command line, this can also be accessed via the **Shift/Right Click** menu **CADmep** --> **Cam/Print** --> **Report Layout** --> **Item Reports**.

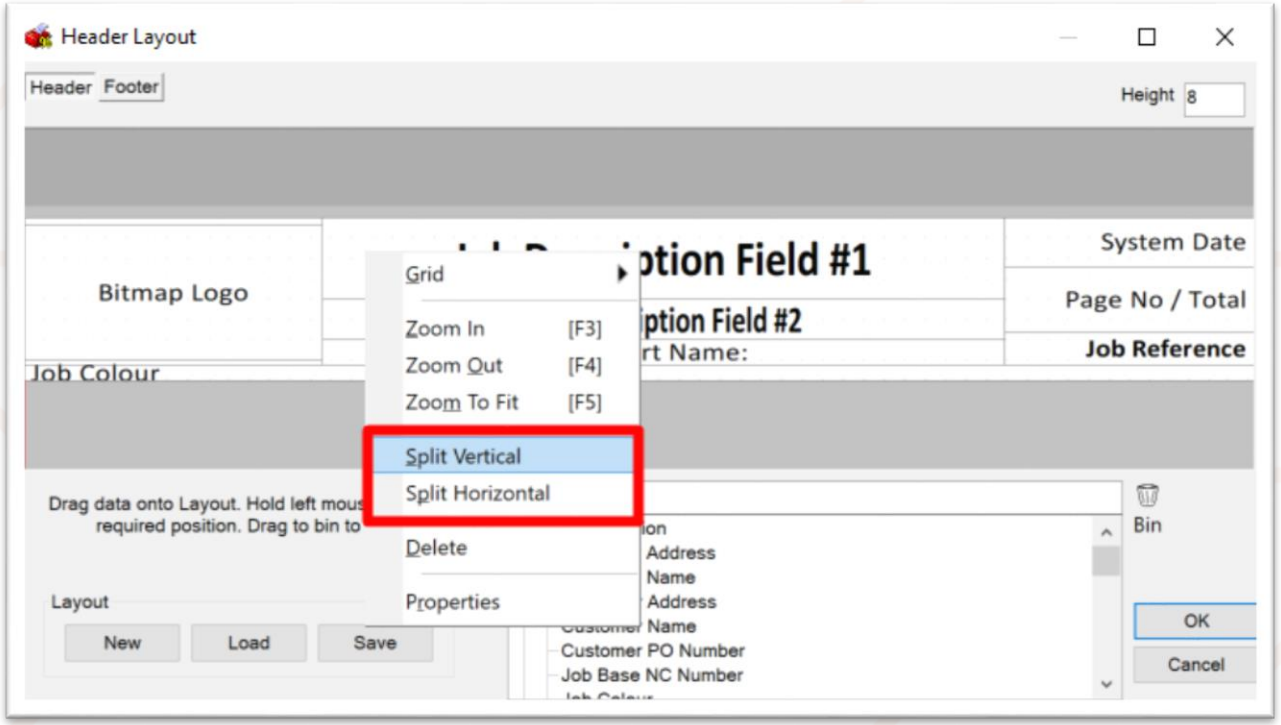
ITEM REPORT BUILDER ANATOMY

The **Item Report Builder** has four main sections.

- Report Naming & Formatting
- Print Objects
- Report Contents
- Report Details



SPLITTING CELLS



If you **Right Click** in this area, you can see the option to **Split Horizontally** or **Split Vertically**. Doing this, allows you to create new cells either above or beside the current cell.

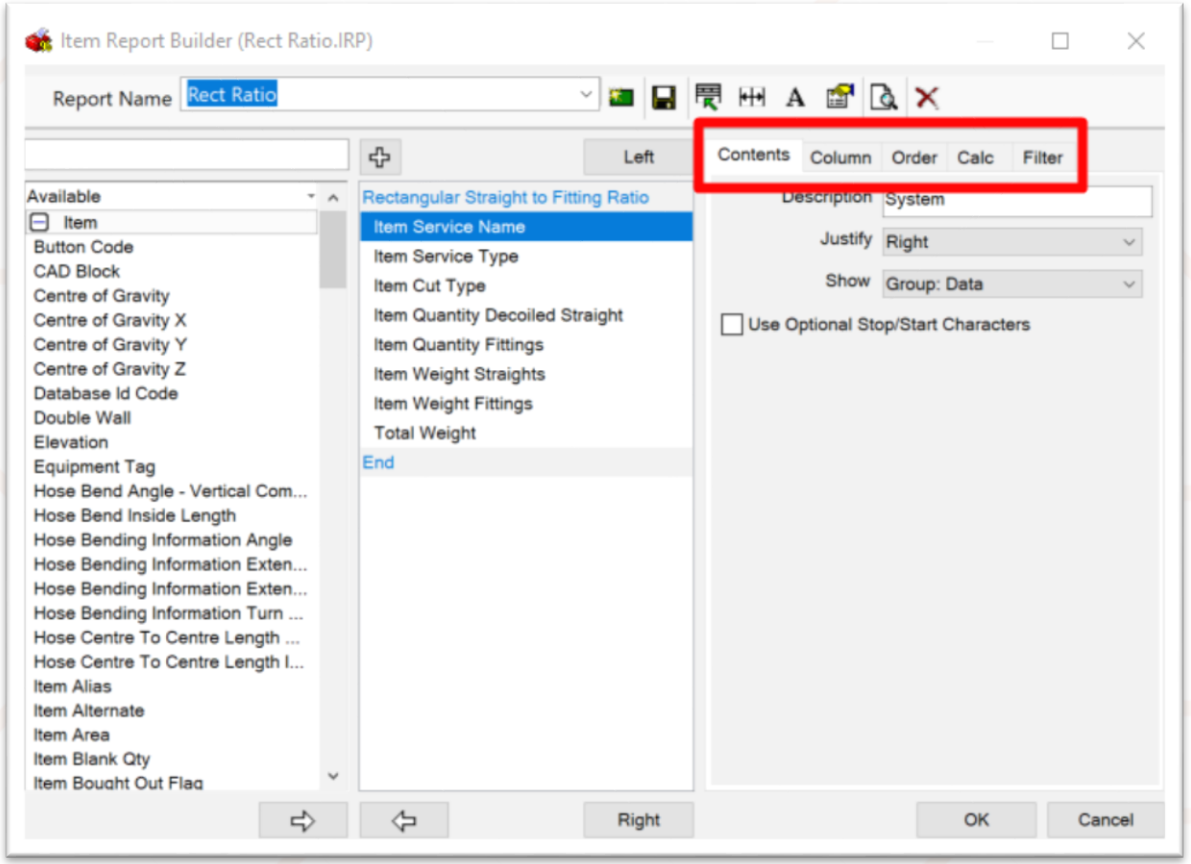
CREATING A REPORT

In order to create a report, we will need to select the **Print Objects** we need on the left and one by one select them and hit the arrow at the bottom pointing to the right. This will move the selected fields from the **Print Objects** side to the **Report Contents** side.

Required fields for this report

- Item Service Name
- Item Service Type
- Item Cut Type
- Item Quantity Decoiled Straight
- Item Quantity Fittings
- Item Weight Straights
- Item Weight Fittings
- Total Weight

FORMATTING & BEHAVIOR CONTROLS



On the top of the **Report Details** area there are five tabs.

- **Contents**
- **Column**
- **Order**
- **Calc**
- **Filter**

We will go over the details of each tab in the next few slides.

CONTENT TAB

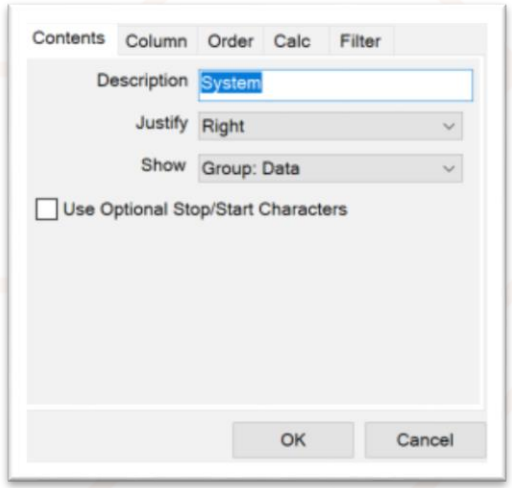
- This tab will display four different object types depending on what fields you have selected. They are as follows:
- **Single information fields**

  Description, Notes, Quantity, Section, Status…
- **Numeric “quantity” based fields**

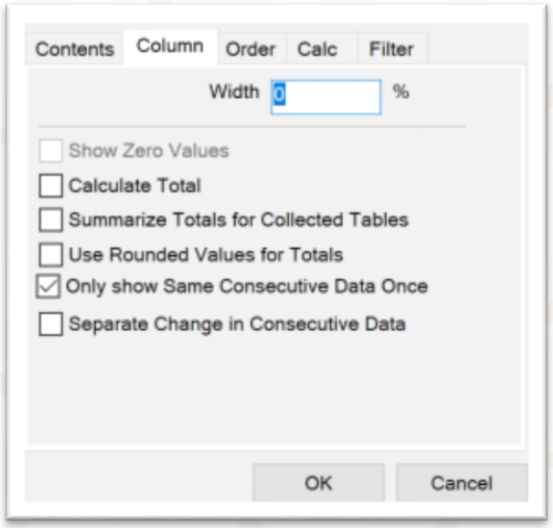
  Area, Weight, Cost…
- **Simple Indexed Lists**

  Connectors, Dimensions, Custom Data Objects…
- **Complex Indexed Lists**

  Connector & Seam lists, Fitting Options…



COLUMN TAB



This tab primarily controls the width of each column but also has some special formatting options. These options control the order in which information will be displayed on a report. It's not the column order though; it is the 'sort' order of the data itself. Priority option allows a hierarchy to be established for sorting across multiple fields. Together they are critical in defining the final "look" of a report. The actual 'sorting' algorithm applied is numeric-alphabetical for example, 1, 1A, 1B, 1X, 2, 3, 3C, 3D, 3F, 4, 5, 11, 35, A1, A2, A3, B1, B15, C1, and so on.

ORDER TAB

This tab will decide the priority by which this data field will be sorted. It will also allow you determine how your fields will group. There are three options available:

- **Normal**

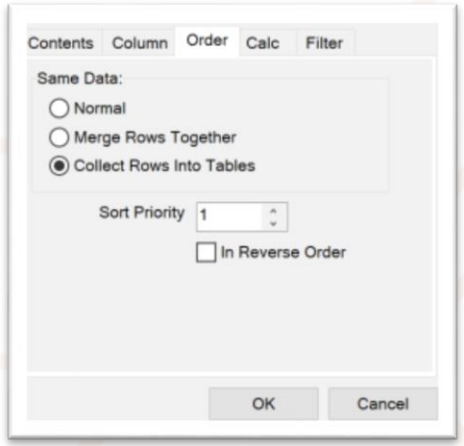
  A priority-based rule for controlling print order. For example, the description followed by the size.

- **Merge Rows Together**

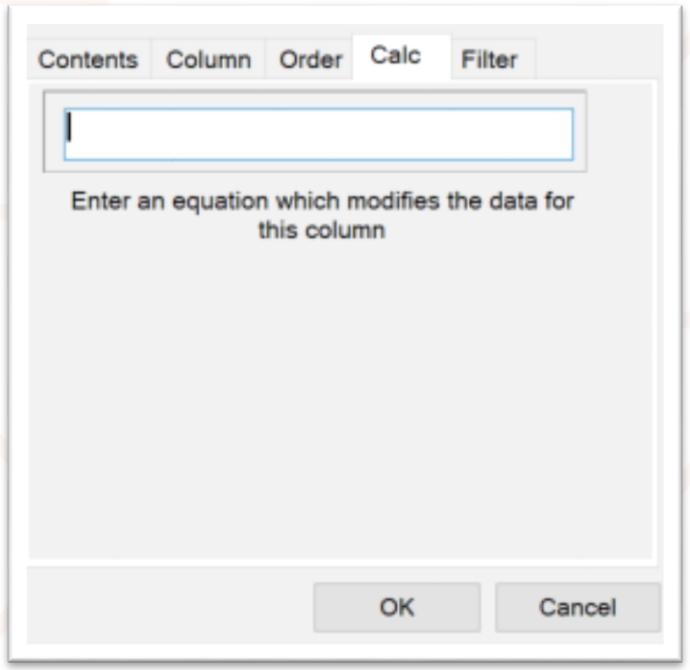
  This is at an advanced level. It can be very tricky and confusing. This will basically combine similar data on to a single line such as Quantified BOM's.

- **Collect Rows into Tables**

  This will create individual tables based on identical data. For example, section by section, status by status.

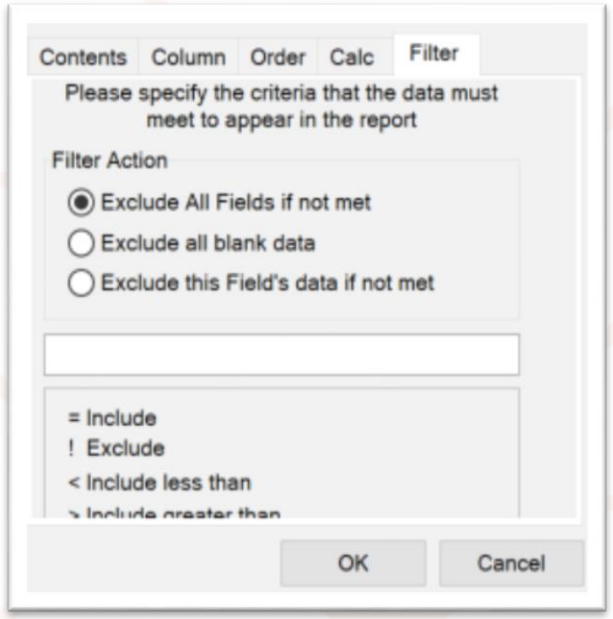


CALC TAB



This does exactly what it says it does. It performs mathematical calculations that are entered.

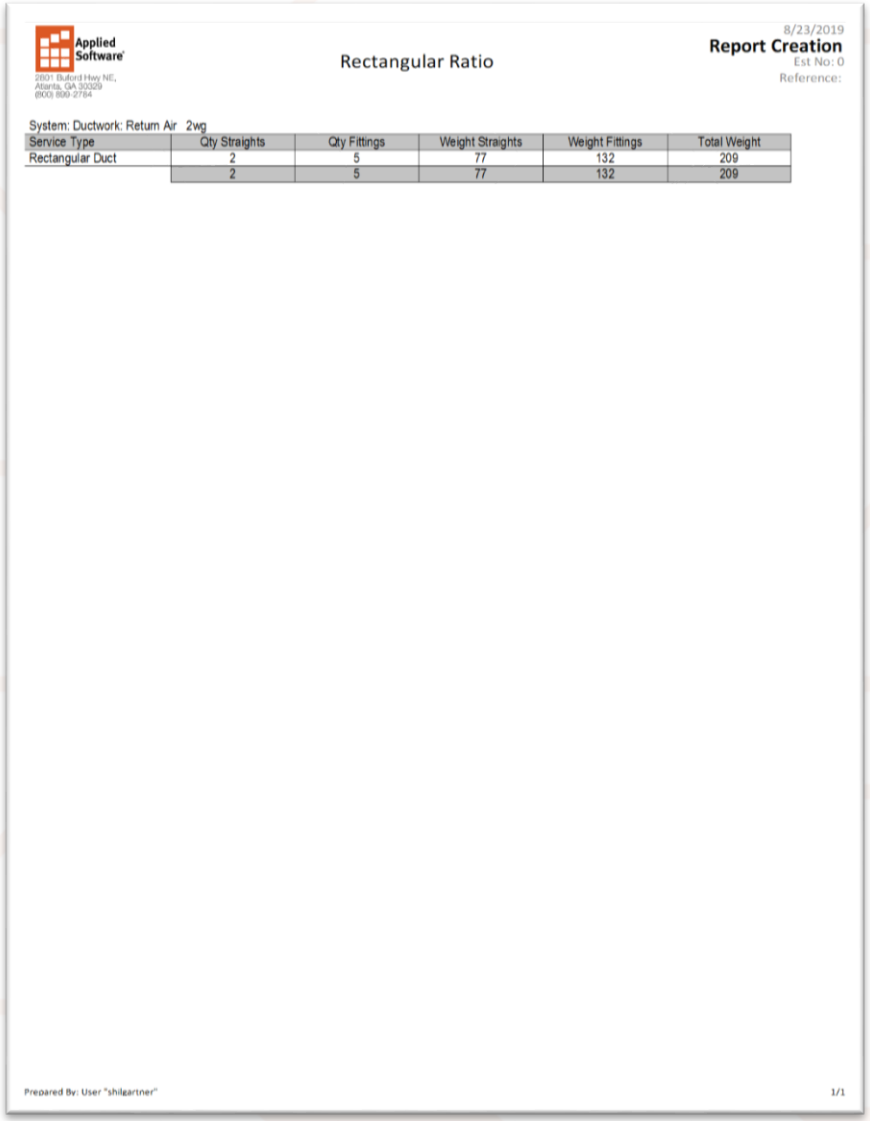
FILTER TAB



This allows “selective” rule-based reporting. It uses **‘Boolean’** filters to qualify data. For example, equals or not equals, less than or greater than. It can filter entire items or only certain fields. For example, display length or angle for certain items but not others. It also can be used to filter objects that don’t appear on the report as a filter. For example, **Item Cut Type = Decoiled Straight**.

REPORT BUILDING

Using the settings we have gone over, I will now create a custom report for calculating the rectangular ratio of fittings to straights. Follow along on the screen.



Applied Software
2801 Buford Hwy NE,
Atlanta, GA 30329
(800) 890-2784

Rectangular Ratio

8/23/2019
Report Creation
Est No: 0
Reference:

System: Ductwork: Return Air 2wg

Service Type	Qty Straights	Qty Fittings	Weight Straights	Weight Fittings	Total Weight
Rectangular Duct	2	5	77	132	209
	2	5	77	132	209

Prepared By: User "shilgartner"

1/1

THANK YOU FOR ATTENDING OUR CLASS!

PLEASE FILL OUT THE SURVEY FOR THIS SESSION IN THE APP.

GO TO “MY SCHEDULE” → SELECT THIS SESSION → SCROLL DOWN TO “SESSION SURVEY”