

OG9582 - Just-in-Time Reporting

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Class summary

Have you struggled to get information out of your project? Do you spend time formatting your reports before submitting them? In this class you will learn how to clean up your reports so they can be used in Microsoft Excel, or imported back in to AutoCAD P&ID software or AutoCAD Plant 3D software. With the powerful report creator, you have full control over how your project information displays. The report creator also gives you hidden tools that help you build new properties or restrict information based on a few criteria. By learning how to fully utilize the report creator, you'll give your project manager more information to review, while emailing fewer files.



Key learning objectives

At the end of this class, you will be able to:

- Learn how to control the export to Excel
- Discover how to build expressions
- Learn how to filter report information with power filters
- Learn how to import a Report back into the project



Introduction

- Who is ECAD?

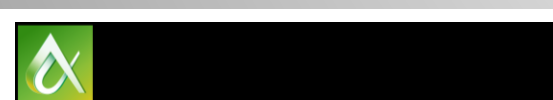


Controlling the Excel Export



Controlling the Excel Export

- Aligned Report controls
 - Drag-Snapping
 - Padding
 - Manual Size
- Text Formatting
- General Tips
 - XLS/XLSx Export Options

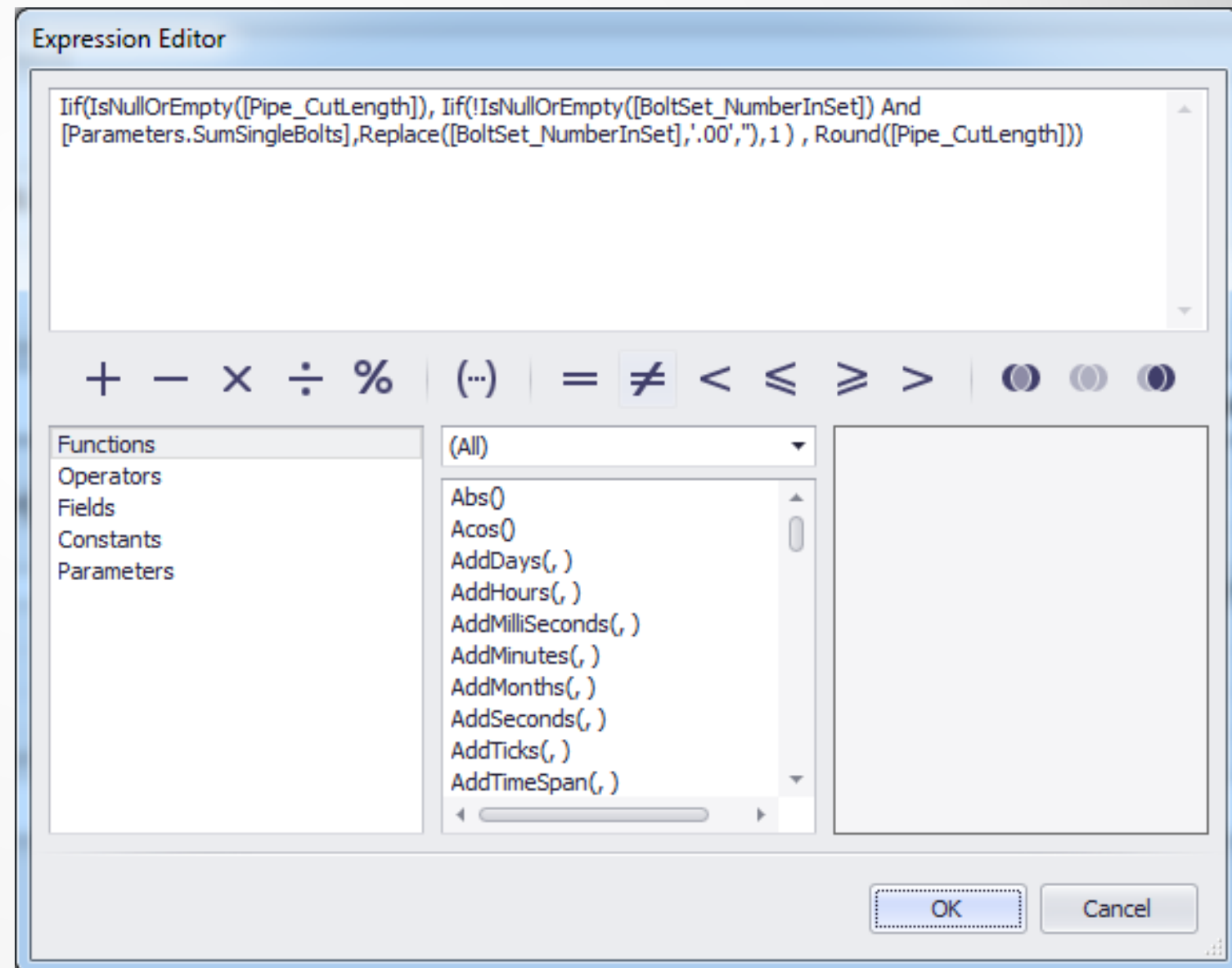


Discover How to Build Expressions



Expressions

- Examine the Quantity Expression



Power Filters



Power Filter

- Plant 3D Filter method
 - Awkward
 - Time-intensive
- Report Creator Method



Consuming Reports



Consuming Reports

- The import process requires headers on row one
- Minimize the header row

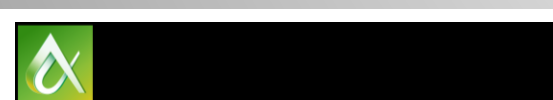


Wrapping Up



Notes

- Links
 - <http://pdoteam.com>
 - [Plant 3d Discussion Forum](#)
 - [Plant IdeaStation](#)
- 2016 help - <http://help.autodesk.com/view/PLNT3D/2016/ENU/>
- [Demystifying AutoCAD Isometrics](#)
- [Tailoring AutoCAD P&ID and Plant 3d](#)
- Apps
 - App Store: ECAD Inc.
 - <http://www.pdoteam.com/store/fast-track-plant/>



Support

- **WASP Plant Support**
 - Available to users who have a reseller that is not plant certified for free.
 - Email or phone support available.
- **ECAD Support**
 - Try then buy



Q & A



