

OUTLINE

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Report Administration Online
Training

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3DEXPERIENCE®

DS DELMIA | Apriso

REP001

Report Administration



DS DASSAULT SYSTEMES | The **3DEXPERIENCE®** Company



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Report Administration Online Training

Abstract:

This training will introduce you to the DELMIA Apriso Report Administrator. You will learn how to create a new report using Microsoft Reporting Services.

Detailed objectives. After the training you will know:

- ▶ How to create a new report
- ▶ How to upload a report file to DELMIA Apriso
- ▶ How to view, save, export, and print a report
- ▶ How to customize a report

Target audience:

- ▶ New consultants working with DELMIA Apriso

Requirements:

- ▶ Familiarity with DELMIA Apriso Process Builder and DELMIA Apriso Desktop Client
- ▶ Familiarity with Microsoft Reporting Services

Role and level:

- ▶ DELMIA Apriso Administrators



Duration: 60 min



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Chapter 1: Reports Overview

In this chapter you will find out what Report Administration is, what it is used for and where to find it.

1. Overview
2. Labs





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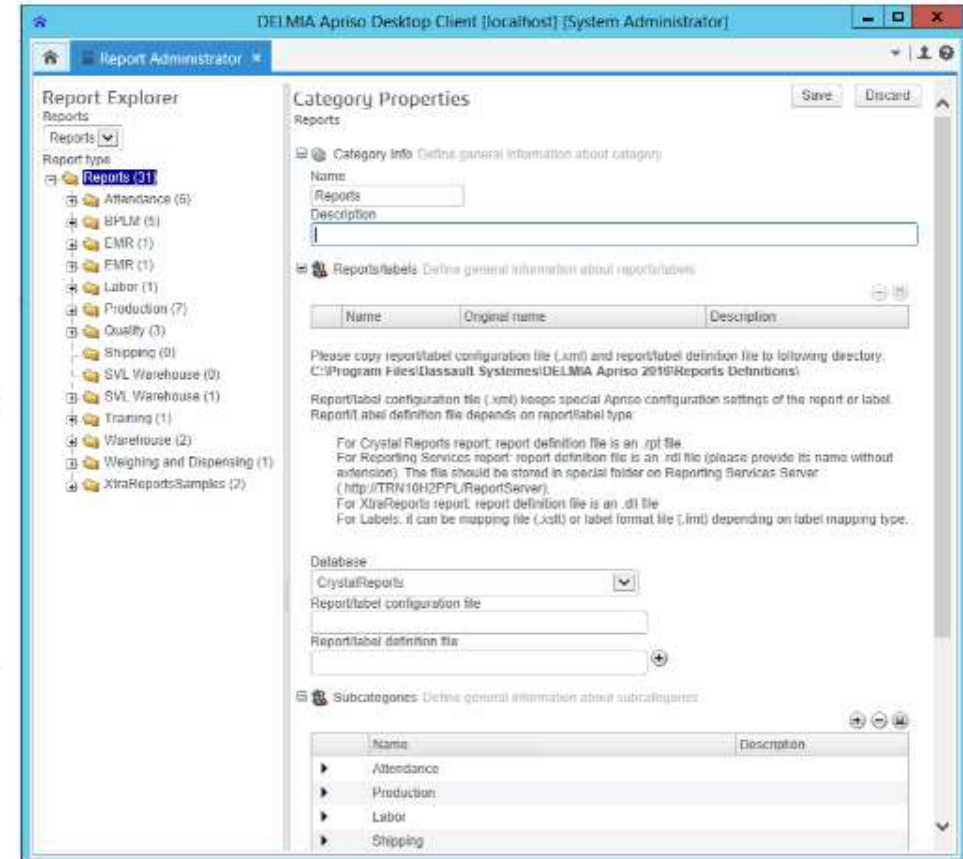
End of Course

Report Administration

Report Administration provides a flexible and easy way to print and display reports when retrieving data from the database, especially for those customers who wish to develop their own reports. Services provides a means to easily integrate reports without additional development effort.

DELMIA Apriso Report Services consists of the following elements:

- **Report Administrator** - a tool for administering reports like adding and removing reports, creating a folder structure, and browsing. This tool is for the user responsible for DELMIA Apriso administration and configuration
- **Report Viewer** - a tool for viewing the reports. It also allows printing or exporting to desired formats according to defined filters
- **Report Printing Engine** - background functionality responsible for printing reports





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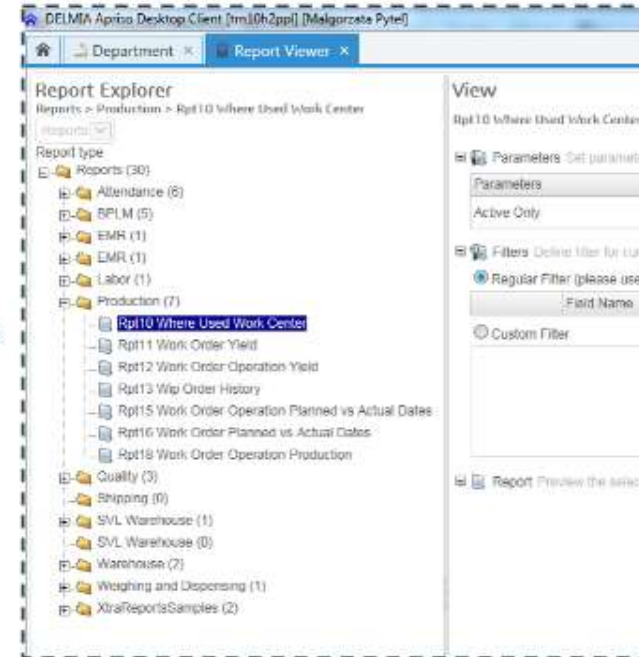
► Chapter 2: Labs

End of Course

Features

The following features are characteristic for SQL Server Reporting Services:

- ▶ Users are provided with the ability to create new reports and add those reports to the DELMIA Apriso Report Viewer without programming
- ▶ Users can create report definition files containing groupings, filters, and parameters that can be applied to reports
- ▶ Only one definition file is generated, which can be used by both MS SQL Server and Oracle
- ▶ The framework allows for changing a database connection without programming and modifying the report definition files
- ▶ The framework supports the configuration of filters, parameters, and groupings without programming and changing the framework



Print			
False	StoreRequestID		
1	NumberOfCopies		
0	PrinterID		
0	ReportID		



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LAB 1: Create New Report
LAB 1: Report Builder
LAB 1: Create Blank Report
LAB 1: Configure the Report
LAB 1: Add a Data Source
LAB 1: Add a Query
LAB 1: MS SQL Server Credentials
LAB 1: Insert a Table
LAB 1: Change Table Definition
LAB 1: View the Report
LAB 1: Save the Report in the
AprisoReports Folder
End of LAB 2

Chapter 2: Labs

1. Overview
2. Labs



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End of LAB 2

LAB 1: Create New Report





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LAB 1: Insert a Table

LAB 1: Change Table Definition

LAB 1: View the Report

LAB 1: Save the Report in the AprisoReports Folder

End of LAB 2

LAB 1: Create New Report

Task:

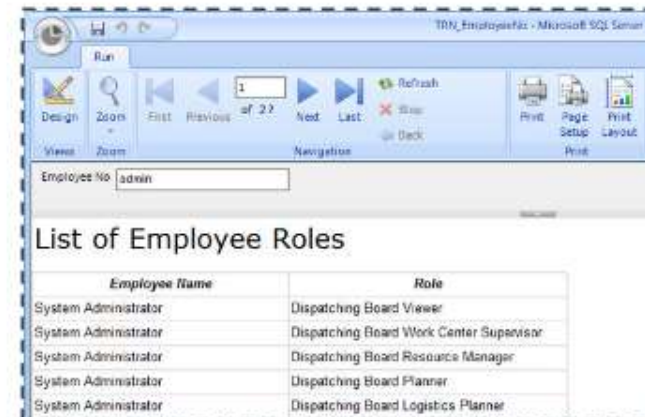
- ▶ Create a new report file

What you will learn:

- ▶ How to create a new report
- ▶ How to add a dataset to a new report

Training environment:

- ▶ In case of any technical problems, please contact DELMIA.Apriso.training@3ds.com



Remember to use the following to login and name Screens thorough this entire training:

- TRN<yourinitials> if your are an external self-paced learner
- TRN<yourtrigram> if you are a 3DS employee self-paced learner



15 min



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LAB 1: Change Table Definition

LAB 1: View the Report

LAB 1: Save the Report in the AprisoReports Folder

End of LAB 2

LAB 1: Report Builder

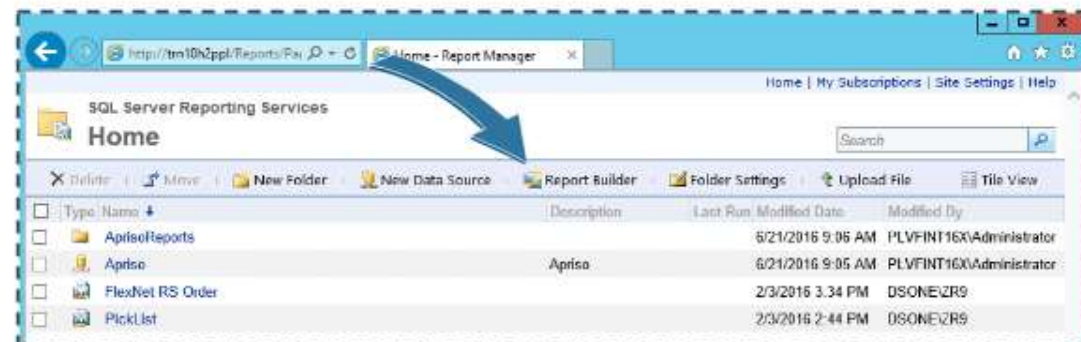
► Open SQL Server Reporting Services:

- <http://<servername>/Reports>

You must use Internet Explorer, do not use any other browser for this session.

► Click on Report Builder

- You may be asked to install ReportBuilder - follow through with the installation



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LAB 1: Insert a Table

LAB 1: Change Table Definition

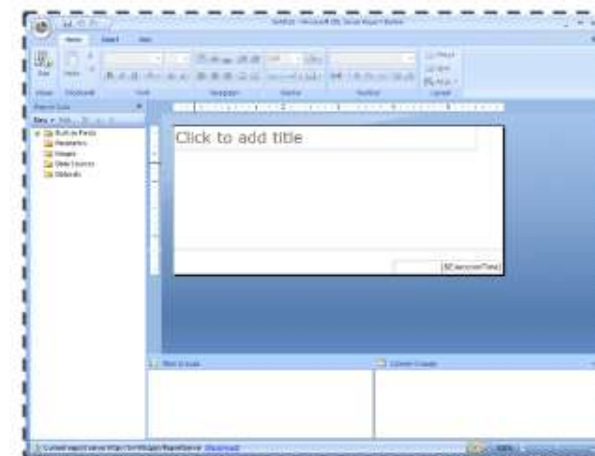
LAB 1: View the Report

LAB 1: Save the Report in the
AprisoReports Folder

End of LAB 2

LAB 1: Create Blank Report

► Choose Blank Report





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LAB 1: Insert a Table

LAB 1: Change Table Definition

LAB 1: View the Report

LAB 1: Save the Report in the
AprisoReports Folder

End of LAB 2

LAB 1: Configure the Report

This report will list all employees and their roles.

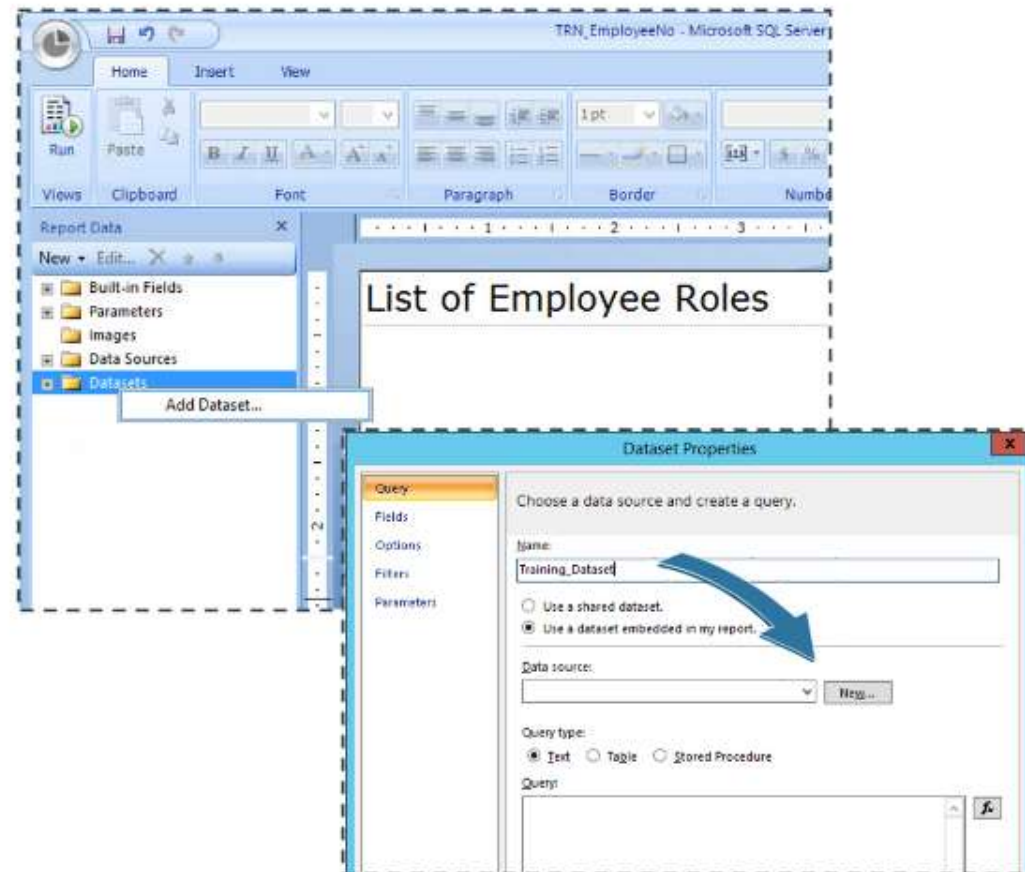
- ▶ Name the report: TRNXX - List of Employee Roles
- ▶ Right-click on Datasets and Add Dataset

The Dataset Properties tab will open.

- ▶ Name the dataset: Training_DataSet
- ▶ Select "Use a dataset embedded in my report"

As a data source, we will use the default source

- ▶ Select New for Data source





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LAB 1: Insert a Table

LAB 1: Change Table Definition

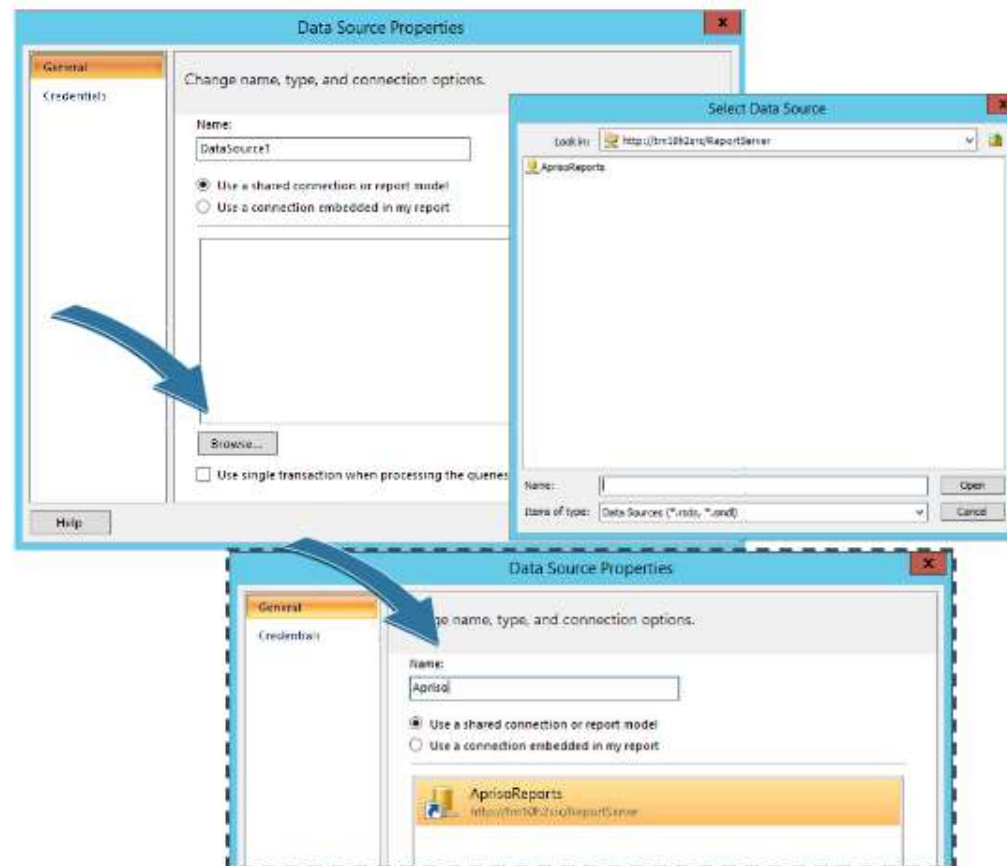
LAB 1: View the Report

LAB 1: Save the Report in the
AprisoReports Folder

End of LAB 2

LAB 1: Add a Data Source

- ▶ Select Browse and from the wizard choose AprisoReports
 - The default path should be:
<http://servername/ReportServer>
- ▶ Name the source AprisoReports
- ▶ Then, click Ok to return to Dataset Properties





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LAB 1: Change Table Definition

LAB 1: View the Report

LAB 1: Save the Report in the
AprisoReports Folder

End of LAB 2

LAB 1: Add a Query

▶ On Dataset Properties double-check:

- The name is Training_DataSet
- "Use a dataset embedded in my report" is checked
- Data source is Apriso

Now, we can put in the query that will list all employee roles, as we need for our report.

Click on Query window and paste the query from scripts:

SCRIPT FILE: Desktop/Training Materials/Level 1

- Select the Parameters menu

Dataset Properties

Choose a data source and create a query.

Name: Training_DataSet

☐ Use a shared dataset.
☒ Use a dataset embedded in my report.

Data source: Apriso New...

Query type: ☒ Text ☐ Table ☐ Stored Procedure

Query:

```
SELECT e.Name,
r.Role
FROM EMPLOYEE e
JOIN EMPLOYEE_ROLE er
ON er.EmployeeID = e.ID
JOIN ROLE r
ON r.ID = er.RoleID
WHERE e.EmployeeNo = @EmployeeNo
```

Query Designer... Import... Refresh Fields

Time out (in seconds): 0

Help OK Cancel





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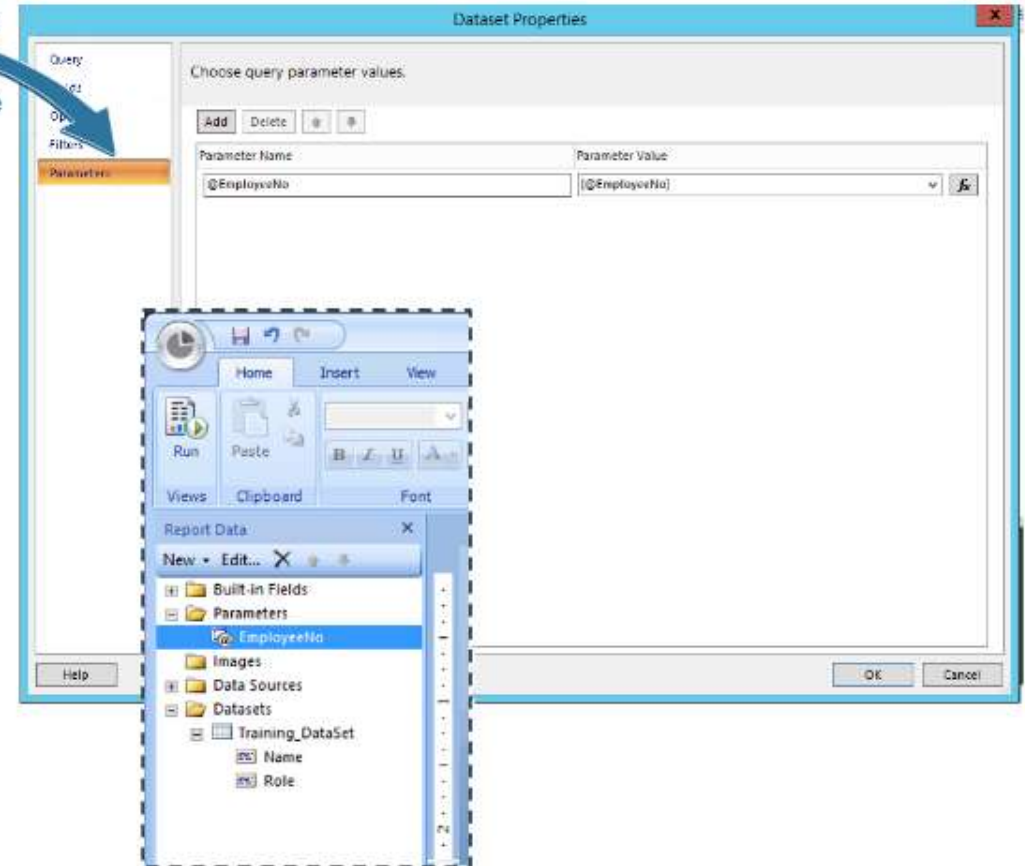
End of LAB 2

LAB 1: MS SQL Server Credentials

- ▶ Notice that a new parameter - EmployeeNo - was added to the report
 - If the system asks you for credentials to the MS SQL Server Management:
 - User: sa
 - Login: Apriso2014
- ▶ Provide parameter value as @EmployeeNo

As mentioned, the new report parameter has been automatically added - EmployeeNo. This is the input parameter to the dataset.

Later on, when we load that report in DELMIA Apriso, we will define that parameter in an XML file that presents the results.





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LAB 1: Change Table Definition

LAB 1: View the Report

LAB 1: Save the Report in the
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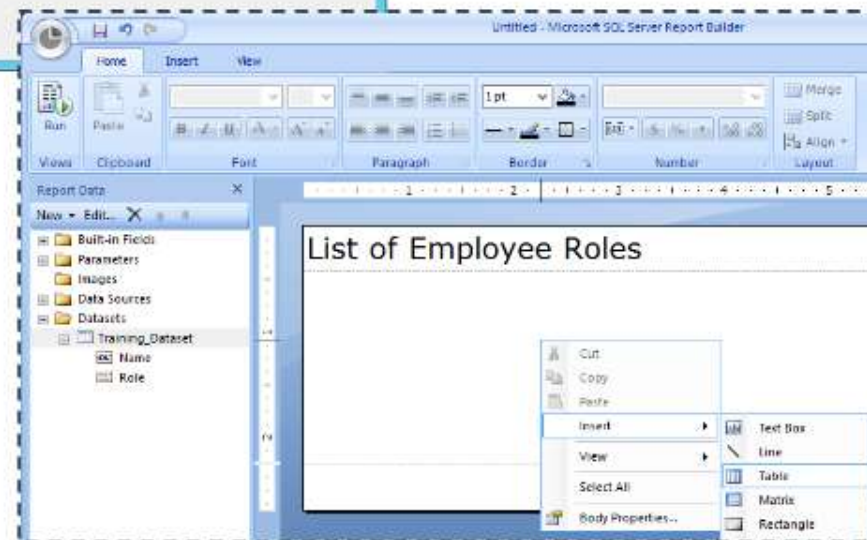
End of LAB 2

LAB 1: Insert a Table

SQL Server will ask you to confirm your credentials, check Save password with connection for future situations

Now, we can add a new table that will present the results of our query.

- ▶ Right-click on the report and choose Insert -> Table





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LAB 1: MS SQL Server Credentials

LAB 1: Insert a Table

LAB 1: Change Table Definition

LAB 1: View the Report

LAB 1: Save the Report in the AprisoReports Folder

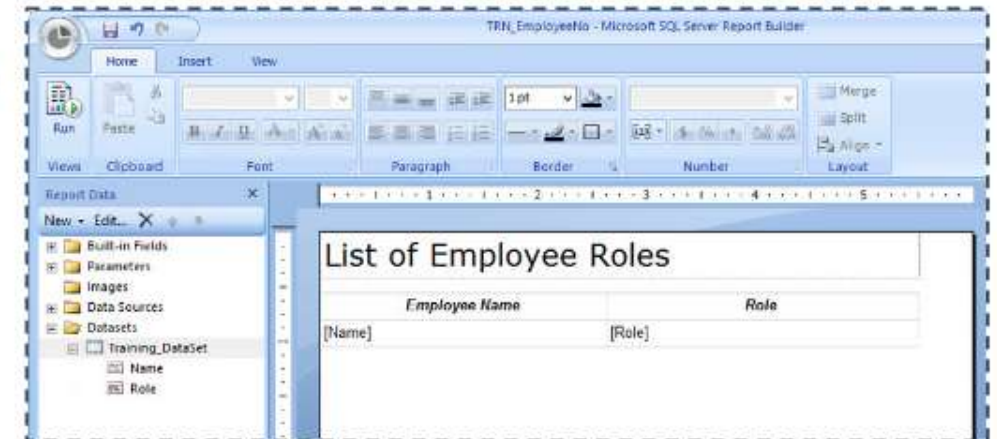
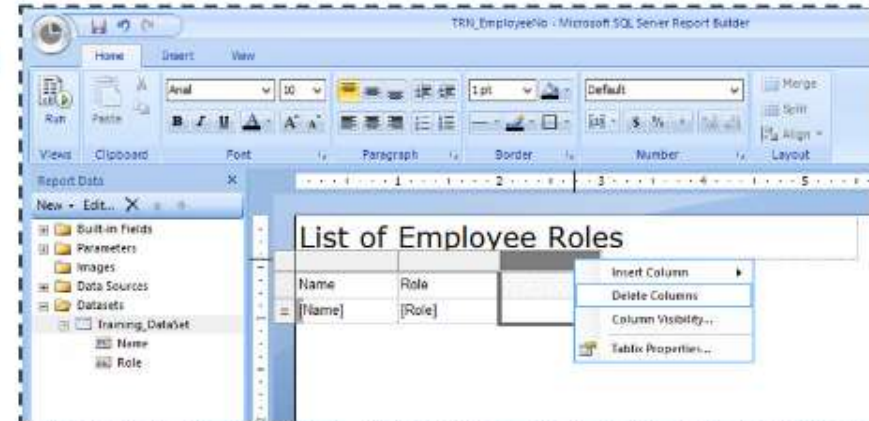
End of LAB 2

LAB 1: Change Table Definition

- ▶ From the Report Data column on the left, drag and drop Name to the first column and Role to the second column
- ▶ To remove the column right click on top of the grey part, and click Delete Columns

We can now adjust the table size, format the column headings, and position the table under the header.

- ▶ To change the header name, click on the cell. Change Name to Employee Name, set the font to Bold Italics, and center it in the column
- ▶ Resize both columns so they are the width of the title (List of Employee Roles), and divide them roughly in half



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LAB 1: Insert a Table

LAB 1: Change Table Definition

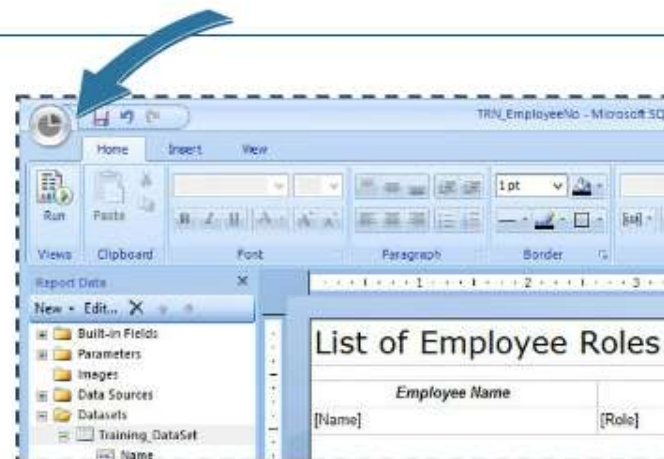
LAB 1: View the Report

LAB 1: Save the Report in the AprisoReports Folder

End of LAB 2

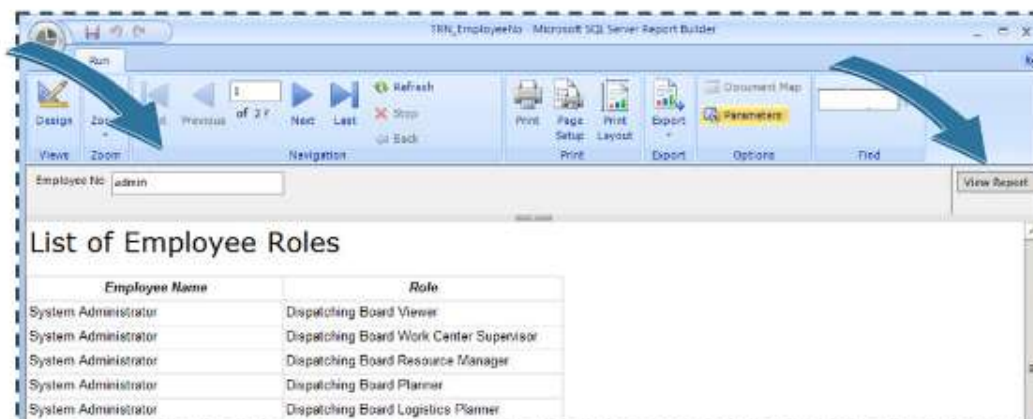
LAB 1: View the Report

Now that the report is finished, let's check the results.



- ▶ Click on Run and wait for the fields to load
- ▶ Type in any EmployeeNo - e.g. admin - and click on View Report

The results will show you all the Roles assigned to that particular Employee.





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LAB 1: Insert a Table

LAB 1: Change Table Definition

LAB 1: View the Report

LAB 1: Save the Report in the
AprisoReports Folder

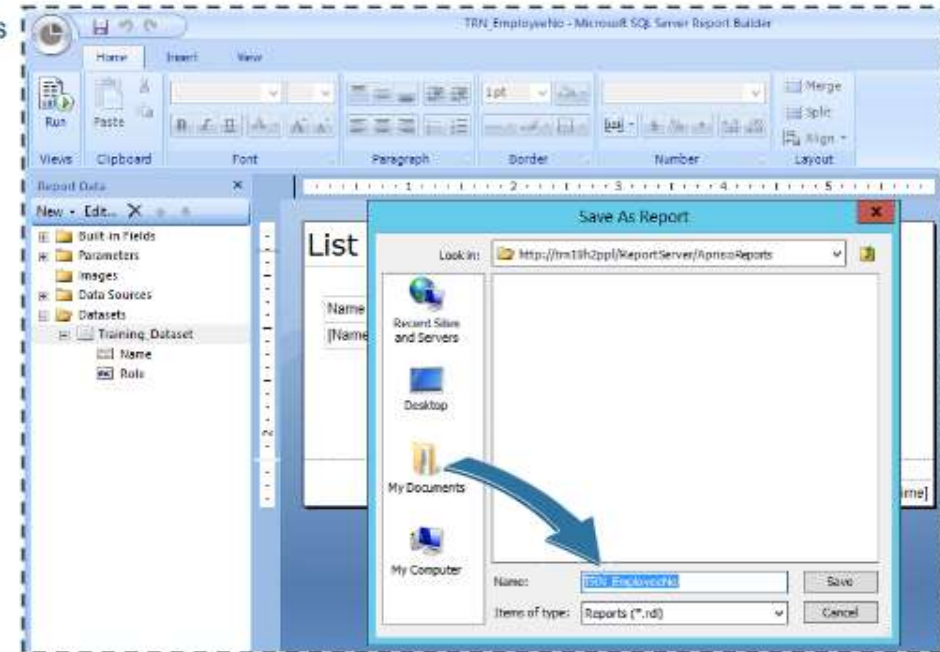
End of LAB 2

LAB 1: Save the Report in the AprisoReports Folder

- ▶ Save the report on the server in the AprisoReports folder, name it TRN_EmployeeNo

We created this report template on the Report Services server. Now, let's go to the DELMIA Apriso Desktop Client to load the report there.

Do not close the Report Builder, we will need to save this report one more time.



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What is the basic workflow report?

LAB 1: Configure the Report

LAB 1: Add a Data Source

LAB 1: Add a Query

LAB 1: MS SQL Server Credentials

LAB 1: Insert a Table

LAB 1: Change Table Definition

LAB 1: View the Report

LAB 1: Save the Report in the
AprisoReports Folder

End of LAB 2

LAB 2: Load Report to DELMIA Apriso

LAB 2: Load Report to DELMIA
Apriso

LAB 2: Create New Folder

LAB 2: Save the Report

LAB 2: Create an XML File

LAB 2: Create New Folder in the
Report Administrator

LAB 2: Upload the XML File

LAB 2: Check Your Report in Report
Explorer

LAB 2: Load Report to DELMIA Apriso



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LAB 1: Configure the Report

LAB 1: Add a Data Source

LAB 1: Add a Query

LAB 1: MS SQL Server Credentials

LAB 1: Insert a Table

LAB 1: Change Table Definition

LAB 1: View the Report

LAB 1: Save the Report in the AprisoReports Folder

End of LAB 2

LAB 2: Load Report to DELMIA Apriso

LAB 2: Load Report to DELMIA Apriso

LAB 2: Create New Folder

LAB 2: Save the Report

LAB 2: Create an XML File

LAB 2: Create New Folder in the Report Administrator

LAB 2: Upload the XML File

LAB 2: Check Your Report in Report Explorer

LAB 2: Load Report to DELMIA Apriso

Task:

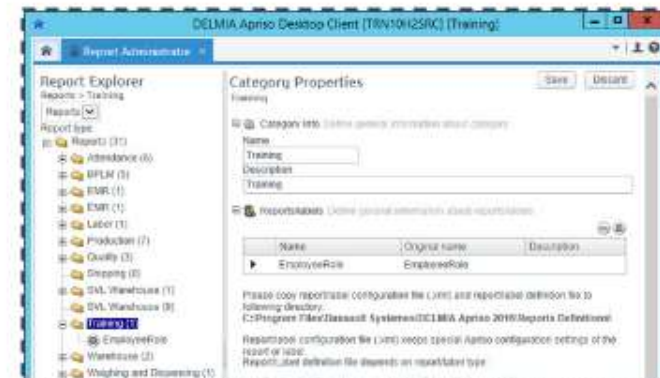
- ▶ Create report in DELMIA Apriso

What you will learn:

- ▶ How to create a folder for reports
- ▶ How to create an XML file for reading the report parameters
- ▶ How to load report files to DELMIA Apriso
- ▶ How to run a report in the Desktop Client

Training environment:

- ▶ In case of any technical problems, please contact DELMIA.Apriso.training@3ds.com



15 min



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What do you want to report?

LAB 1: Configure the Report

LAB 1: Add a Data Source

LAB 1: Add a Query

LAB 1: MS SQL Server Credentials

LAB 1: Insert a Table

LAB 1: Change Table Definition

LAB 1: View the Report

LAB 1: Save the Report in the AprisoReports Folder

End of LAB 2

LAB 2: Load Report to DELMIA Apriso

LAB 2: Load Report to DELMIA Apriso

LAB 2: Create New Folder

LAB 2: Save the Report

LAB 2: Create an XML File

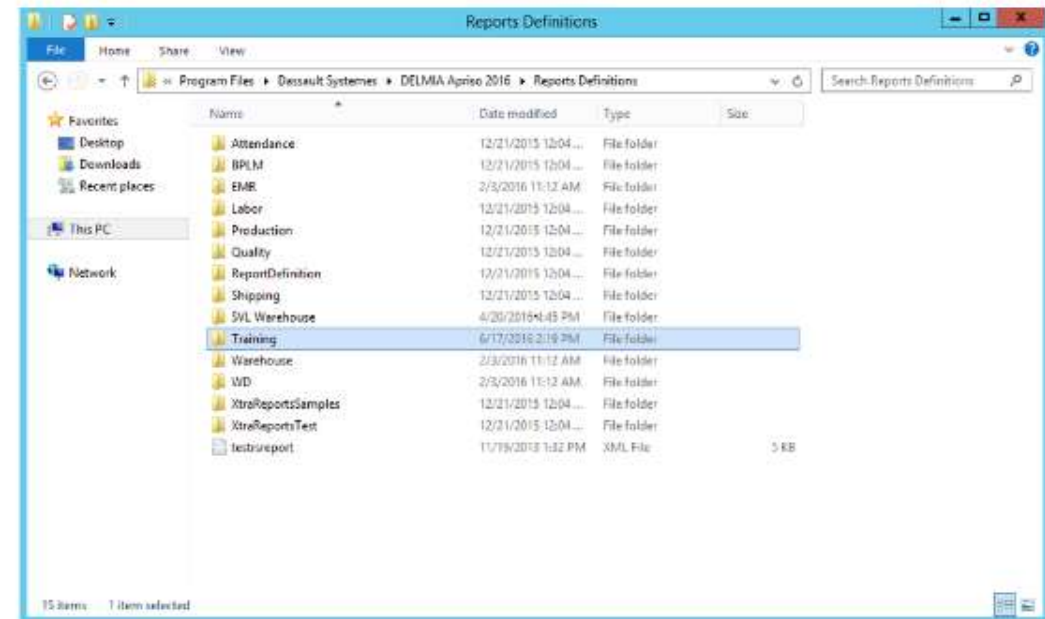
LAB 2: Create New Folder in the Report Administrator

LAB 2: Upload the XML File

LAB 2: Check Your Report in Report Explorer

LAB 2: Create New Folder

- ▶ Go to Program Files -> Dassault Systemes -> DELMIA Apriso 2016 -> Report Definitions
- ▶ Create a new folder, Training



LAB 1: Configure the Report

LAB 1: Add a Data Source

LAB 1: Add a Query

LAB 1: MS SQL Server Credentials

LAB 1: Insert a Table

LAB 1: Change Table Definition

LAB 1: View the Report

LAB 1: Save the Report in the AprisoReports Folder

End of LAB 2

LAB 2: Load Report to DELMIA Apriso

LAB 2: Load Report to DELMIA Apriso

LAB 2: Create New Folder

LAB 2: Save the Report

LAB 2: Create an XML File

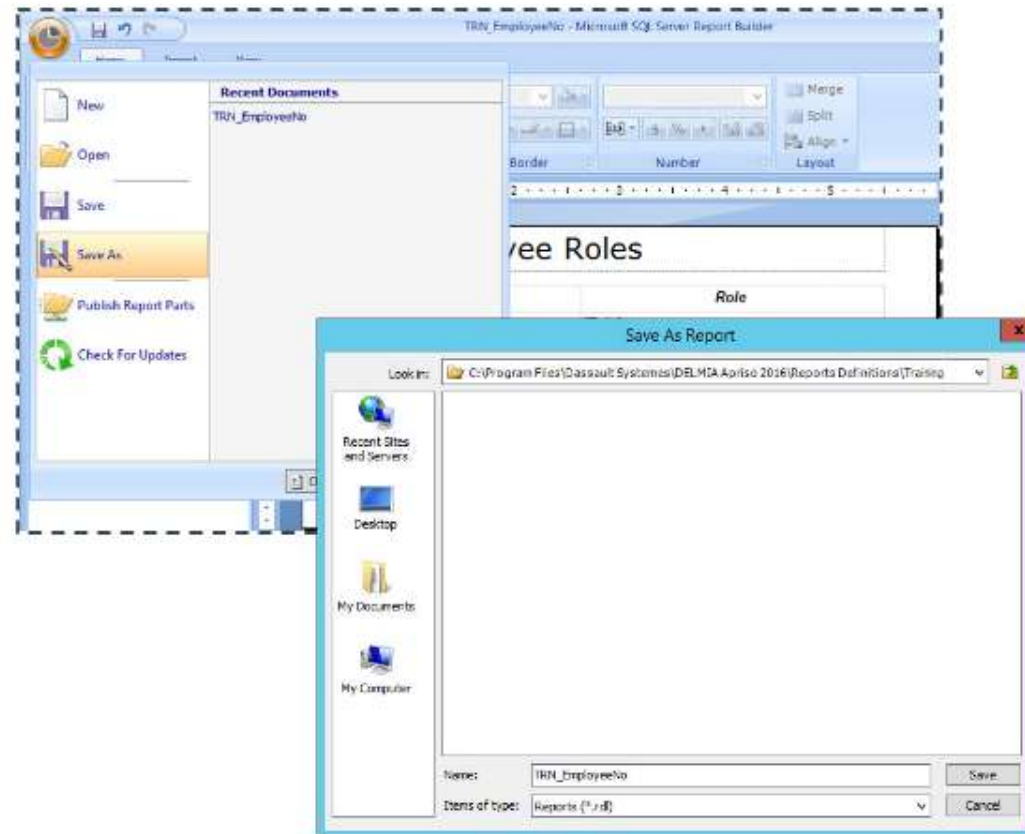
LAB 2: Create New Folder in the Report Administrator

LAB 2: Upload the XML File

LAB 2: Check Your Report in Report Explorer

LAB 2: Save the Report

- ▶ Go back to the Report Builder, click on the top-left corner and select Save As
- ▶ Navigate to the folder you just created, and save it there.





LAB 1: Configure the Report

LAB 1: Add a Data Source

LAB 1: Add a Query

LAB 1: MS SQL Server Credentials

LAB 1: Insert a Table

LAB 1: Change Table Definition

LAB 1: View the Report

LAB 1: Save the Report in the
AprisoReports Folder

End of LAB 2

LAB 2: Load Report to DELMIA
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LAB 2: Create New Folder

LAB 2: Save the Report

LAB 2: Create an XML File

LAB 2: Create New Folder in the
Report Administrator

LAB 2: Upload the XML File

LAB 2: Check Your Report in Report
Explorer

LAB 2: Create an XML File

An XML file will be used by DELMIA Apriso to recognize the parameters of the report from the server.

- ▶ Create an XML file using the script in scripts file:
 - Use Notepad++

SCRIPT FILE: Desktop/Training Materials/Level 1

- You may have to save the file on the desktop and then move it to the folder
- ▶ Save as an XML file in the Training folder, name it TRN_EmployeeNo.xml

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LAB 1: Configure the Report

- LAB 1: Add a Data Source
- LAB 1: Add a Query
- LAB 1: MS SQL Server Credentials
- LAB 1: Insert a Table
- LAB 1: Change Table Definition
- LAB 1: View the Report
- LAB 1: Save the Report in the AprisoReports Folder

End of LAB 2

- LAB 2: Load Report to DELMIA Apriso
- LAB 2: Load Report to DELMIA Apriso
- LAB 2: Create New Folder
- LAB 2: Save the Report
- LAB 2: Create an XML File

LAB 2: Create New Folder in the Report Administrator

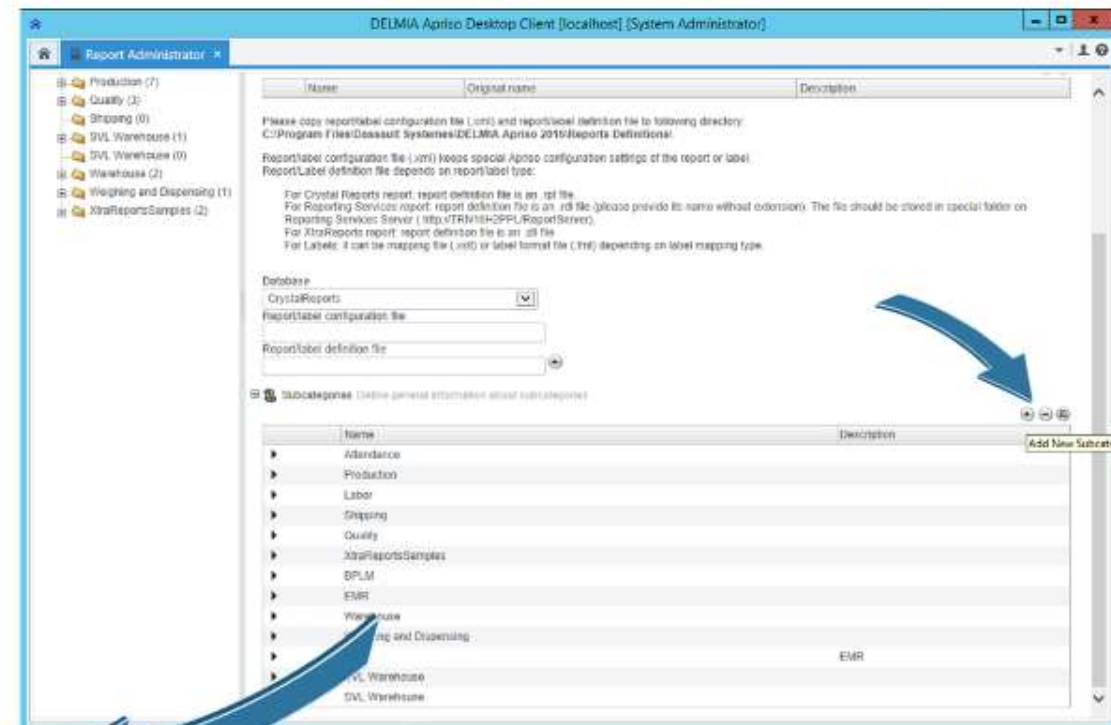
LAB 2: Upload the XML File

LAB 2: Check Your Report in Report Explorer

LAB 2: Create New Folder in the Report Administrator

- ▶ Log in to the Desktop Client
- ▶ Bring up the Report Administrator Screen
- ▶ Under Subcategories, create a new folder named Training

Name	Description
▶ Attendance	
▶ Production	
▶ Labor	
▶ Shipping	
▶ Quality	
▶ XtraReportsSamples	
▶ BPLM	
▶ EMR	
▶ Warehouse	
▶ Weighing and Dispensing	
▶ FMR	FMR
▶ SVL Warehouse	
▶ SVL Warehouse	
▶ Training	Training





LAB 1: View the Report

LAB 1: Save the Report in the AprisoReports Folder

End of LAB 2

LAB 2: Load Report to DELMIA Apriso

LAB 2: Load Report to DELMIA Apriso

LAB 2: Create New Folder

LAB 2: Save the Report

LAB 2: Create an XML File

LAB 2: Create New Folder in the Report Administrator

LAB 2: Upload the XML File

LAB 2: Check Your Report in Report Explorer

End of LAB 2

LAB 3: View the Report in Report Viewer

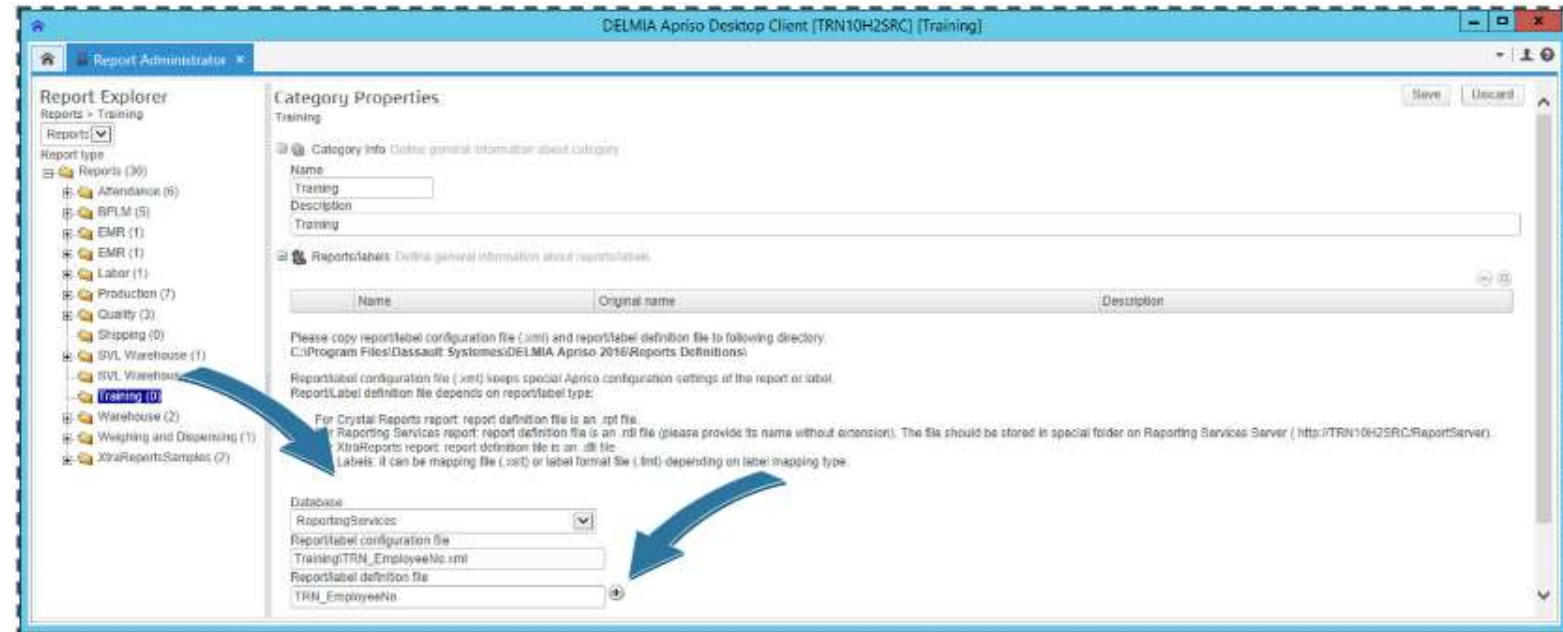
LAB 3: View the Report in Report Viewer

LAB 3: Open Report Viewer

LAB 3: View the Report

LAB 2: Upload the XML File

- Go in to the Training subcategory and upload the XML file created before with the following details:
 - Database: ReportingServices
 - Report/Label configuration file: Training\TRN_EmployeeNo.xml
 - Report/Label definition file (this is the file we created on Report Services server): TRN_EmployeeNo
 - Select the + symbol to add the report





LAB 1: View the Report

LAB 1: Save the Report in the AprisoReports Folder

End of LAB 2

LAB 2: Load Report to DELMIA Apriso

LAB 2: Load Report to DELMIA Apriso

LAB 2: Create New Folder

LAB 2: Save the Report

LAB 2: Create an XML File

LAB 2: Create New Folder in the Report Administrator

LAB 2: Upload the XML File

LAB 2: Check Your Report in Report Explorer

End of LAB 2

LAB 3: View the Report in Report Viewer

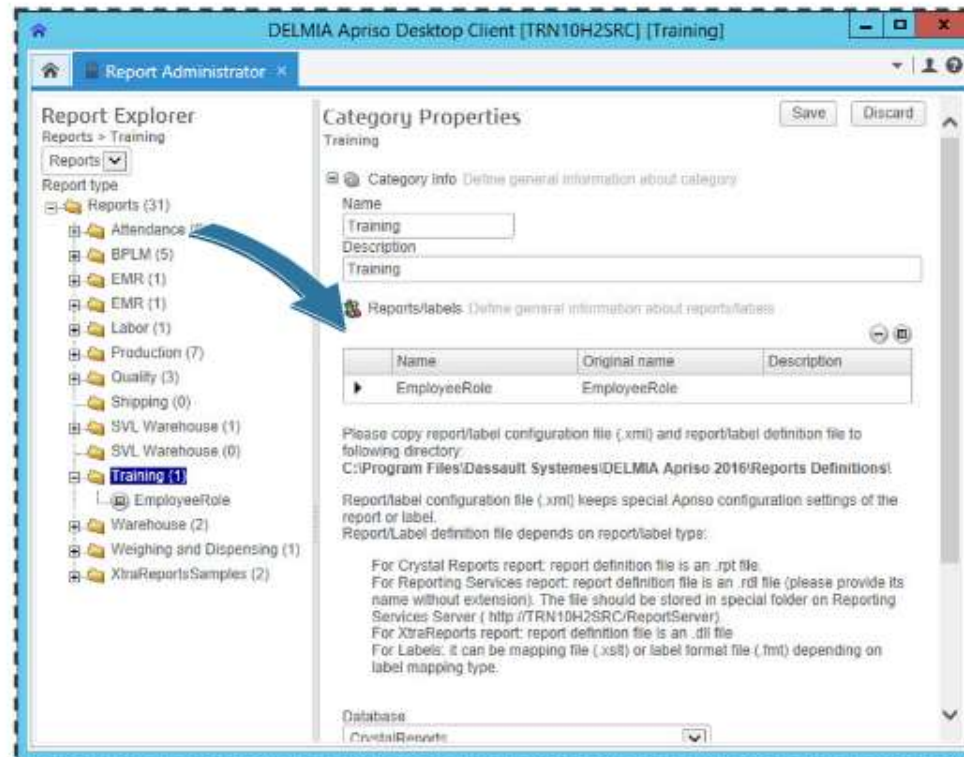
LAB 3: View the Report in Report Viewer

LAB 3: Open Report Viewer

LAB 3: View the Report

LAB 2: Check Your Report in Report Explorer

When the report is added, you will see it under the Report Explorer, on the left side of the screen



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LAB 1: View the Report

LAB 1: Save the Report in the
AprisoReports Folder

End of LAB 2

LAB 2: Load Report to DELMIA
Apriso

LAB 2: Load Report to DELMIA
Apriso

LAB 2: Create New Folder

LAB 2: Save the Report

LAB 2: Create an XML File

LAB 2: Create New Folder in the
Report Administrator

LAB 2: Upload the XML File

LAB 2: Check Your Report in Report
Explorer

End of LAB 2

LAB 3: View the Report in Report
Viewer

LAB 3: View the Report in Report
Viewer

LAB 3: Open Report Viewer

LAB 3: View the Report

LAB 3: View the Report in Report Viewer





LAB 1: View the Report

LAB 1: Save the Report in the AprisoReports Folder

End of LAB 2

LAB 2: Load Report to DELMIA Apriso

LAB 2: Load Report to DELMIA Apriso

LAB 2: Create New Folder

LAB 2: Save the Report

LAB 2: Create an XML File

LAB 2: Create New Folder in the Report Administrator

LAB 2: Upload the XML File

LAB 2: Check Your Report in Report Explorer

End of LAB 2

LAB 3: View the Report in Report Viewer

LAB 3: View the Report in Report Viewer

LAB 3: Open Report Viewer

LAB 3: View the Report

LAB 3: View the Report in Report Viewer

Task:

- ▶ View the Report in Report Viewer

What you will learn:

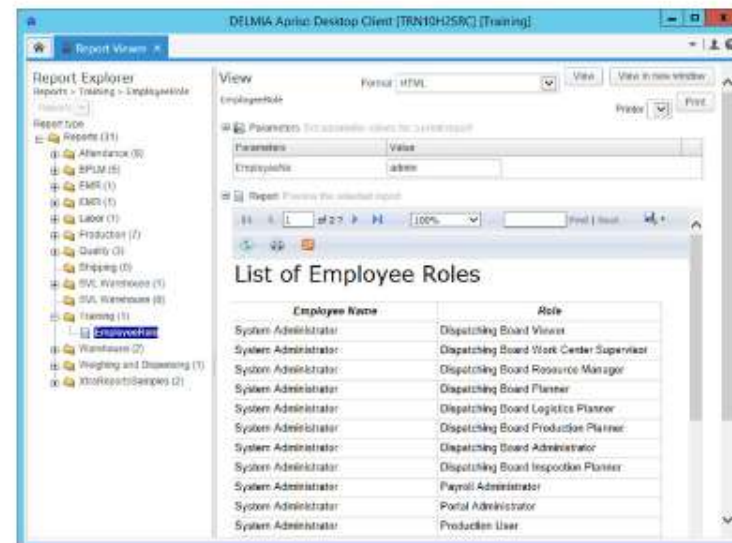
- ▶ How to view reports in the Apriso Desktop Client

Training environment:

- ▶ In case of any technical problems, please contact DELMIA.Apriso.training@3ds.com



15 min



OUTLINE

Search...



LAB 1: View the Report

LAB 1: Save the Report in the AprisoReports Folder

End of LAB 2

LAB 2: Load Report to DELMIA Apriso

LAB 2: Load Report to DELMIA Apriso

LAB 2: Create New Folder

LAB 2: Save the Report

LAB 2: Create an XML File

LAB 2: Create New Folder in the Report Administrator

LAB 2: Upload the XML File

LAB 2: Check Your Report in Report Explorer

End of LAB 2

LAB 3: View the Report in Report Viewer

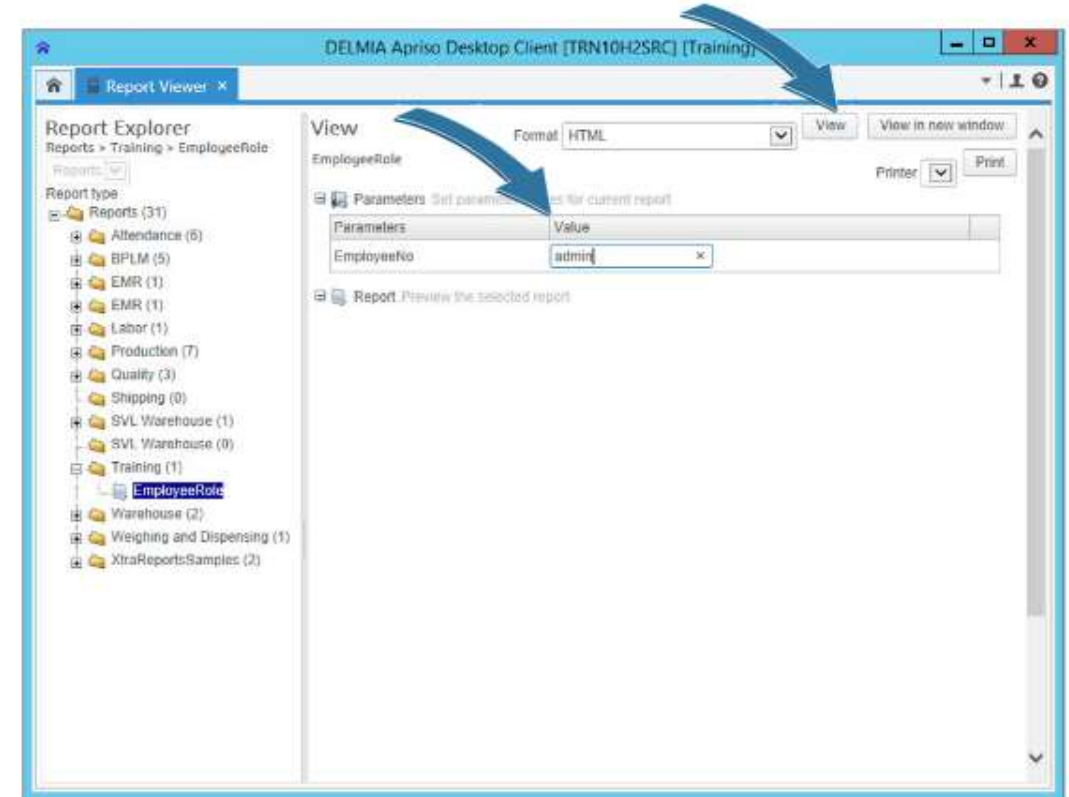
LAB 3: View the Report in Report Viewer

LAB 3: Open Report Viewer

LAB 3: View the Report

LAB 3: Open Report Viewer

- ▶ Open the Report Viewer Screen
- ▶ Navigate to the Training folder we just created
- ▶ Choose the EmployeeRole report
- ▶ Type in any EmployeeNo and click View to see the results



OUTLINE

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LAB 3: View the Report in Report Viewer

LAB 3: Open Report Viewer

LAB 3: View the Report

End of LAB 3

LAB 4: Print the Report to PDF

LAB 4: Print the Report to PDF

LAB 4: Create New Operation

LAB 4: Test Run the Report

LAB 4: Copy the Link to PDF File

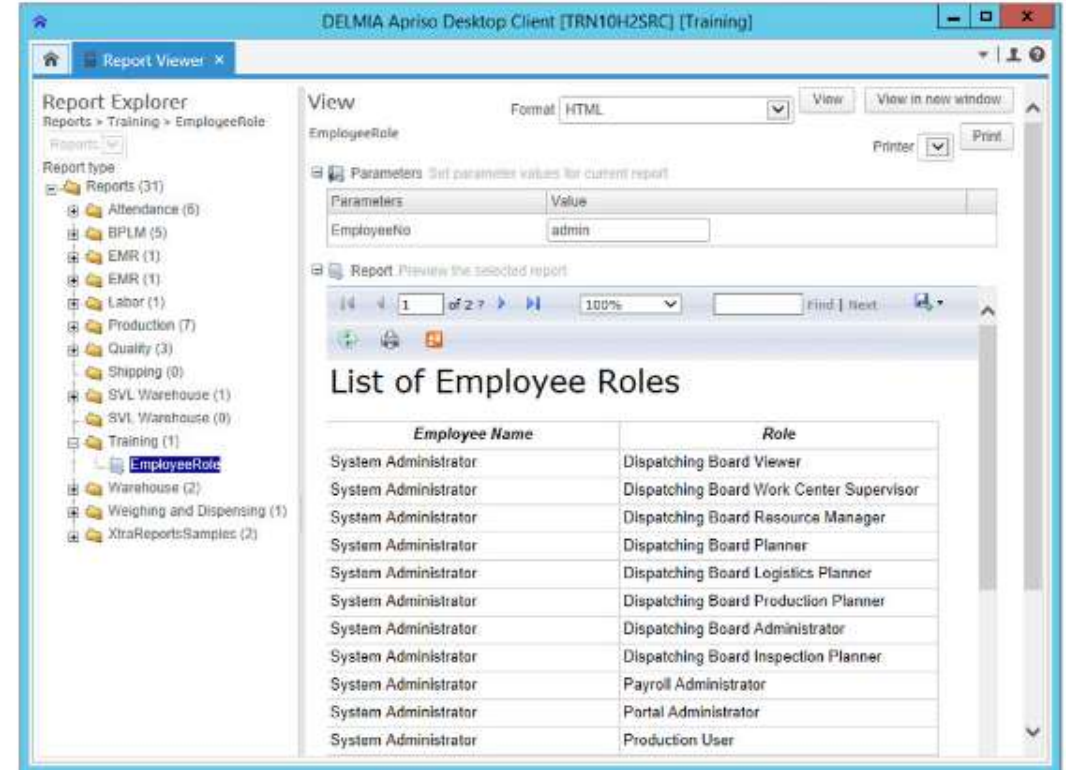
LAB 4: View the Report in a Browser

LAB 5: Customize Report

LAB 5: Customize Report

LAB 3: View the Report

The report should look like just like the preview from Lab 1.



OUTLINE

Search...



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LAB 3: Open Report Viewer

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LAB 4: Print the Report to PDF

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LAB 4: Test Run the Report

LAB 4: Copy the Link to PDF File

LAB 4: View the Report in a
Browser

LAB 5: Customize Report

LAB 5: Customize Report

LAB 4: Print the Report to PDF



OUTLINE

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LAB 4: Copy the Link to PDF File

LAB 4: View the Report in a Browser

LAB 5: Customize Report

LAB 5: Customize Report

LAB 4: Print the Report to PDF

Task:

- ▶ Print the Report to PDF

What you will learn:

- ▶ How to print a file using Submit Print Request function
- ▶ How to configure a Print Report Operation

Training environment:

- ▶ In case of any technical problems, please contact DELMIA.Apriso.training@3ds.com



15 min

Employee Name	Role
System Administrator	Dispatching Board Viewer
System Administrator	Dispatching Board Work Center Supervisor
System Administrator	Dispatching Board Resource Manager
System Administrator	Dispatching Board Planner
System Administrator	Dispatching Board Logistics Planner
System Administrator	Dispatching Board Production Planner
System Administrator	Dispatching Board Administrator
System Administrator	Dispatching Board Inspection Planner
System Administrator	Payroll Administrator
System Administrator	Portal Administrator

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LAB 3: Open Report Viewer

LAB 3: View the Report

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LAB 4: Print the Report to PDF

LAB 4: Create New Operation

LAB 4: Test Run the Report

LAB 4: Copy the Link to PDF File

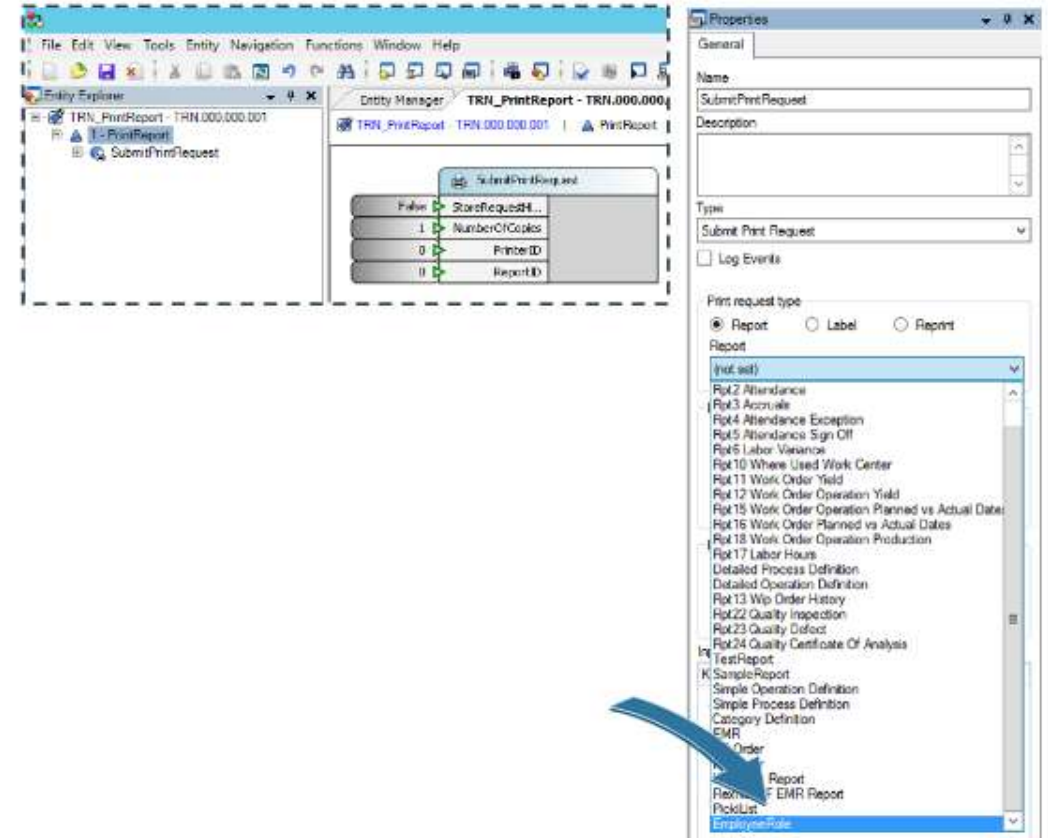
LAB 4: View the Report in a Browser

LAB 5: Customize Report

LAB 5: Customize Report

LAB 4: Create New Operation

- ▶ Log in to Process Builder and create a new Operation named TRNXX_PrintRequest
- ▶ Link the step to the Stop node
- ▶ Add a Submit Print Request function
- ▶ From Properties, go to Print request type and choose the report we created - EmployeeRole





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End of LAB 3

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LAB 4: Print the Report to PDF

LAB 4: Create New Operation

LAB 4: Test Run the Report

LAB 4: Copy the Link to PDF File

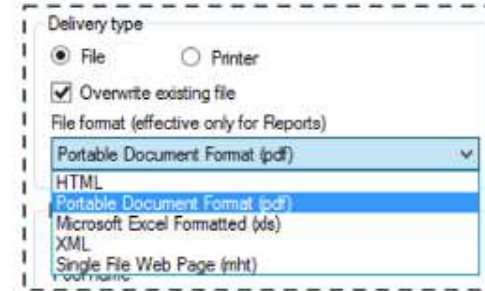
LAB 4: View the Report in a Browser

LAB 5: Customize Report

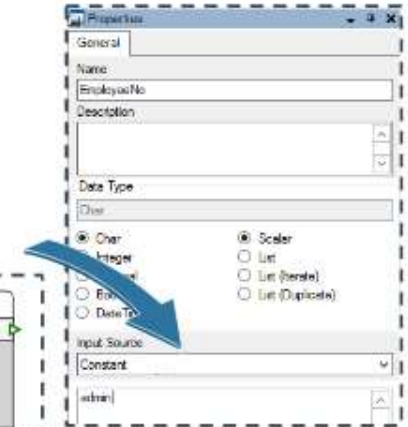
LAB 5: Customize Report

LAB 4: Test Run the Report

- ▶ Under Delivery type, check File
- ▶ Choose Portable Document Format (pdf) under File format



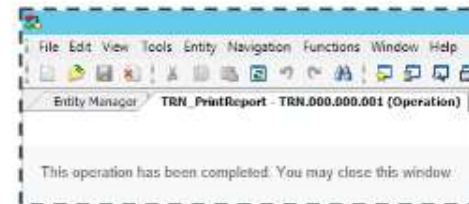
- ▶ Go to EmployeeNo (the parameter used for the report) and add constant Input Source
 - Use admin



- ▶ Test Run the report

The Operation should run in the background and you will only get the end result as „This operation has been completed“ notification.

Don't close the Test Run yet.





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LAB 3: Open Report Viewer

LAB 3: View the Report

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LAB 4: Print the Report to PDF

LAB 4: Print the Report to PDF

LAB 4: Create New Operation

LAB 4: Test Run the Report

LAB 4: Copy the Link to PDF File

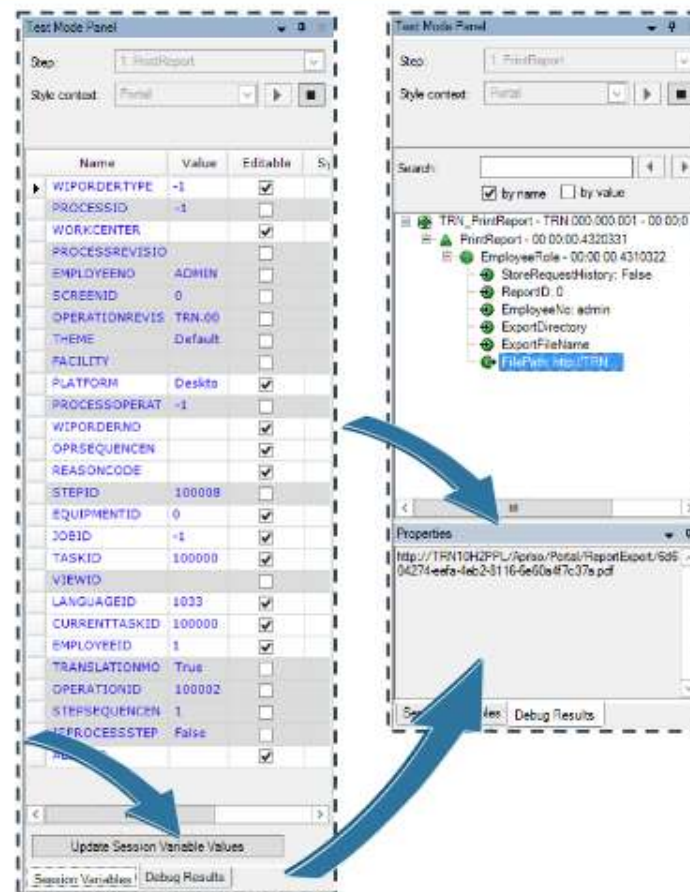
LAB 4: View the Report in a Browser

LAB 5: Customize Report

LAB 5: Customize Report

LAB 4: Copy the Link to PDF File

- ▶ Go to the Debug Results window
- ▶ Unravel the steps and navigate to FilePath
- ▶ Copy the link from the Properties window



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LAB 3: View the Report

End of LAB 3

LAB 4: Print the Report to PDF

LAB 4: Print the Report to PDF

LAB 4: Create New Operation

LAB 4: Test Run the Report

LAB 4: Copy the Link to PDF File

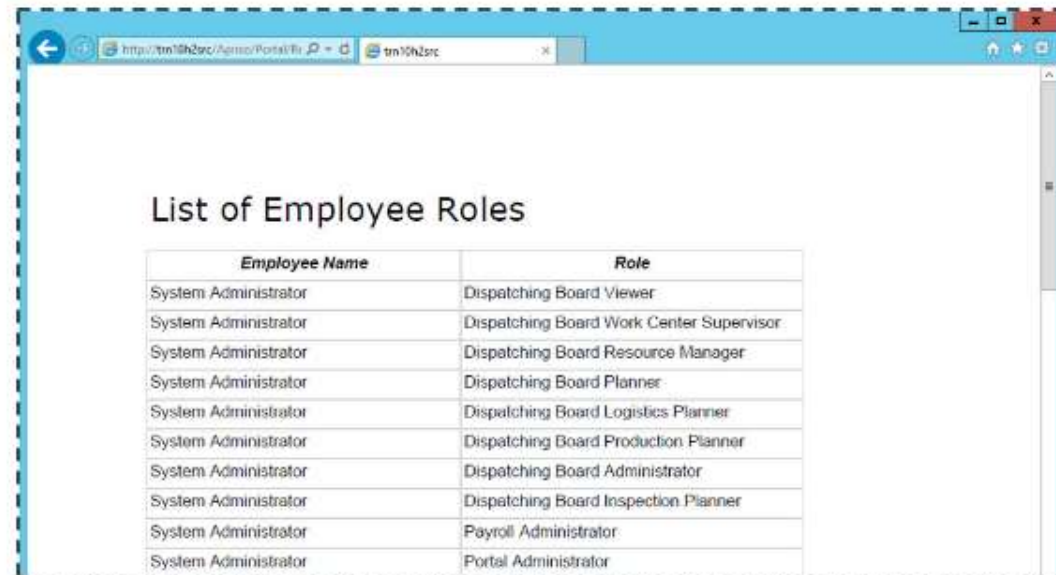
LAB 4: View the Report in a Browser

LAB 5: Customize Report

LAB 5: Customize Report

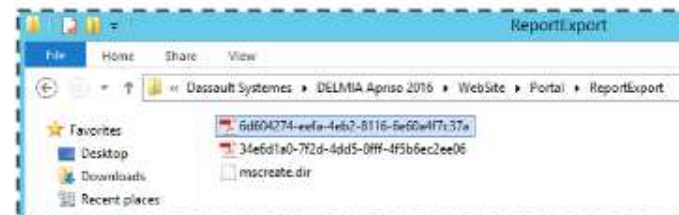
LAB 4: View the Report in a Browser

- Paste the copied link to a browser to view the report



Employee Name	Role
System Administrator	Dispatching Board Viewer
System Administrator	Dispatching Board Work Center Supervisor
System Administrator	Dispatching Board Resource Manager
System Administrator	Dispatching Board Planner
System Administrator	Dispatching Board Logistics Planner
System Administrator	Dispatching Board Production Planner
System Administrator	Dispatching Board Administrator
System Administrator	Dispatching Board Inspection Planner
System Administrator	Payroll Administrator
System Administrator	Portal Administrator

- The report can also be accessed under Program Files/Dassault Systemes/DELMIA Apriso 2016/Website/Portal/ReportExport



OUTLINE

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LAB 3: View the Report in Report
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Viewer

LAB 3: Open Report Viewer

LAB 3: View the Report

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LAB 4: Print the Report to PDF

LAB 4: Print the Report to PDF

LAB 4: Create New Operation

LAB 4: Test Run the Report

LAB 4: Copy the Link to PDF File

LAB 4: View the Report in a
Browser

LAB 5: Customize Report

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LAB 5: Customize Report





LAB 1: Create an XML File

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LAB 5: Customize Report

Task:

- ▶ Customize Report - Change Name and Destination Folder

What you will learn:

- ▶ How to create a Sequence for numbering reports
- ▶ How to use a Business Component and User Formula function to create a custom report name
- ▶ How to change destination folders

Training environment:

- ▶ In case of any technical problems, please contact DELMIA.Apriso.training@3ds.com



15 min

```
C:\Program Files\ Dassault Systemes\DELMIA Apriso 2016\WebSite\CentralConfiguration\CentralConfiguration.xml - Notepad++
File Edit Search View Encoding Language Settings Macro Run Plugins Window ?
CentralConfiguration.xml
041 CustomConnectionParameters - The connection string used to access the database.-->
042 <!--The default URL where reports/labels are generated.
043 The default is: "C:\Program Files\Dassault Systemes\Apriso <version>\WebSite\Portal\ReportExport"-->
044 <add key="ReportExportUrl" value="$WebSitePath\Portal\ReportExport" />
045 <!--The default URL to the directory where reports are exported as a file when a target directory is not provided
046 (ReportExportDir).
047 This can be used to "link" user output for browsing the generated document.-->
048 <add key="ReportExportUrl" value="$WebRootURL/Portal/ReportExport/" />
049 <!--This setting configures the file encoding used when printing labels directly to file using the SubmitPrintRequest
050 Process Builder Function.
051 The default value is UTF-8 for Unicode.
052 To use different encoding, provide the required code page name (e.g., JPUMP for J2M Latin 2) -->
```





End of LAB 2

LAB 3: View the Report in Report Viewer

LAB 3: View the Report in Report Viewer

LAB 3: Open Report Viewer

LAB 3: View the Report

End of LAB 3

LAB 4: Print the Report to PDF

LAB 4: Print the Report to PDF

LAB 4: Create New Operation

LAB 4: Test Run the Report

LAB 4: Copy the Link to PDF File

LAB 4: View the Report in a Browser

LAB 5: Customize Report

LAB 5: Customize Report

LAB 5: Change Filename

LAB 5: Sequence Maintenance

LAB 5: Test Run the Operation

LAB 5: Change the Default Folder

End of Course

LAB 5: Change Filename

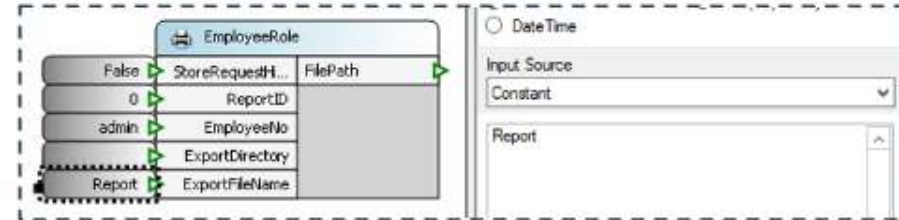
As you probably noticed, the reports are saved with the FUID number as their name, which makes them difficult to recognize if there are many reports in the folder.

- To change this and give the reports a fixed name, go to the operation and change the ExportFileName to a constant value, e.g. Report

This will add the name, but if you run multiple reports, the file will get rewritten every time, so after running multiple operations, you will only have one file with the latest report.

You can modify the TRN_PrintRequest Operation in a way that will use a fixed name and a counter as a filename. To make this happen, we need to create a sequence for numerals and use a Business Component to connect the numeral with the name.

Go to the Desktop Client and load the Sequence Maintenance Screen.



DELMIA Apriso Desktop Client [localhost] [System Administrator]

Sequence Maintenance

Sequences

Options

Facility	Name	Prefix	Next	Min	Max	Start	Increment
	SERIAL_NO	S	11095	0	10000000		1
	ALERT_ID		1	0	10000000		1
	LOT_NO	L	287	0	10000000		1
	CONTAINER_N	L	2	0	10000000		1
	FILE_MOVER	F	1	0	10000000		1
	WIP_SERIAL_N	SER	95	0	10000000		1
	WIP_ORDER_N		1101	0	10000000		1
	TRANSACTION_T		133001	0	10000000		1
	INVENTORY_D		1	0	10000000		1
	EXTRACTION_N		1	0	10000000		1
	COUNT_DOCUM		1	0	10000000		1
	DISPOSITION	D	107	0	10000000		1



End of LAB 2

LAB 3: View the Report in Report Viewer

LAB 3: View the Report in Report Viewer

LAB 3: Open Report Viewer

LAB 3: View the Report

End of LAB 3

LAB 4: Print the Report to PDF

LAB 4: Print the Report to PDF

LAB 4: Create New Operation

LAB 4: Test Run the Report

LAB 4: Copy the Link to PDF File

LAB 4: View the Report in a Browser

LAB 5: Customize Report

LAB 5: Customize Report

LAB 5: Change Filename

LAB 5: Sequence Maintenance

LAB 5: Test Run the Operation

LAB 5: Change the Default Folder

End of Course

LAB 5: Sequence Maintenance

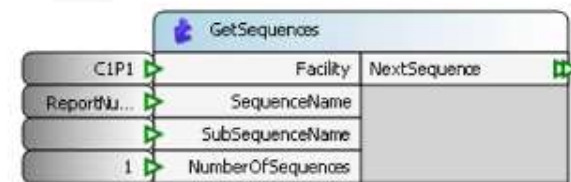
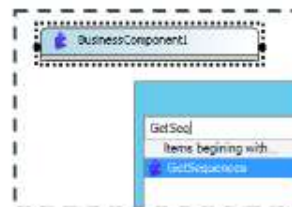
► Add a new Sequence with the following details:

- Facility: C1P1 (this field is mandatory)
- Name: ReportNumber
- Prefix: No
- Min: leave 0
- Max: 9999 (the last number for the report will be 9999 - if the site is running more, you but a higher number as well)
- Increment: 1

► Go back our operation in PB

► Add the GetSequences Business Component

- Facility: C1P1
- SequenceName: ReportNumber
- NumberOfSequences: 1





End of LAB 2

LAB 3: View the Report in Report Viewer

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LAB 5: Customize Report

LAB 5: Customize Report

LAB 5: Change Filename

LAB 5: Sequence Maintenance

LAB 5: Test Run the Operation

LAB 5: Change the Default Folder

End of Course

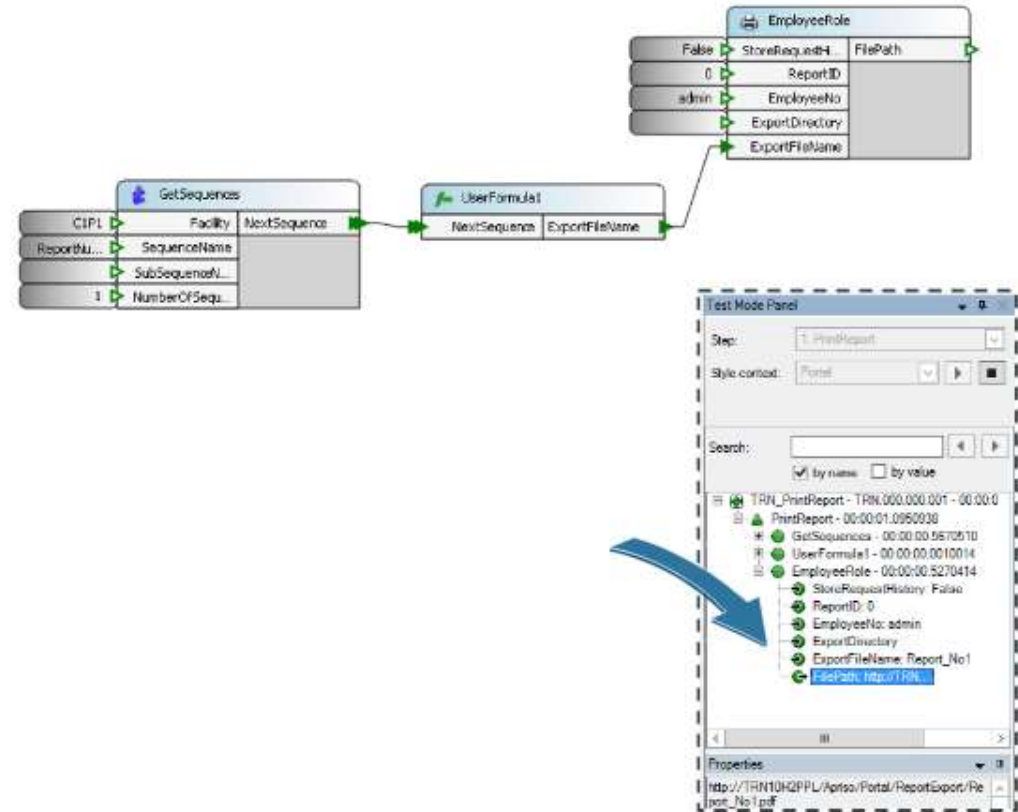
LAB 5: Test Run the Operation

- ▶ Add a User Formula function, add one Input and one Output and connect the NextSequence Output from the BC and ExportFile name Input from our Submit Print Request function
- ▶ In the User Formula editor put a simple query to connect the name with the numerals. In our scripts, we use the name Report_ and the number:

SEE SCRIPTS

- ▶ Test Run the operation and check details in Debug Results

You can also check the default folder to see if the reports are there.





End of LAB 2

LAB 3: View the Report in Report Viewer

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LAB 3: View the Report

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LAB 5: Customize Report

LAB 5: Change Filename

LAB 5: Sequence Maintenance

LAB 5: Test Run the Operation

LAB 5: Change the Default Folder

End of Course

LAB 5: Change the Default Folder

Another way to customize the report is change the default folder where the reports are saved for something more accessible.

- ▶ Open the CentralConfiguration.xml from Program Files/Dassault Systemes/DELMIA Apriso 2016/WebSite/CentralConfiguration
- ▶ Navigate to ReportExportDir to change the default directory to any of your choosing
- ▶ And to ReportExportUrl to change the default URL as above
- ▶ Restart IIS (run command prompt as administrator, use command „iisreset“)

Now you should have custom named reports saved in a custom folder.

