

SmartPlant Fusion

Viewer's Guide



Version 2016 R1 (4.1)

July 2016



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Preface

This document is the viewer's guide for SmartPlant® Fusion. This document provides information and procedural instructions for viewing the SmartPlant Fusion objects using the SmartPlant Fusion Explore module, SmartPlant Fusion Web Portal, and SmartPlant Foundation Desktop Client.

SmartPlant Fusion Product Documentation

SmartPlant Fusion documentation is available as Help and as Adobe® PDF files. To view printable guides for SmartPlant Fusion, click **Help > Printable Guides** in the software.

Intergraph gives its customers permission to print as many copies of the delivered PDF files as they need for their non-commercial use. Do not print the PDF files for resale or redistribution.

Installation and Overviews

- *SmartPlant Fusion Release Bulletin* - Provides information on the SmartPlant Fusion features for the current release.
- *SmartPlant Fusion Installation and Configuration Guide* – Provides installation, set up, and configuration information. It also provides information about troubleshooting the software.
- *SmartPlant Fusion Getting Started Guide* - Provides overview information to help users start working in SmartPlant Fusion.

Administrative Guide

- *SmartPlant Fusion Administrator's Guide* - Provides information such as general conceptual information, procedures, and vocabulary necessary to use the SmartPlant Fusion Data Capture Administration module.

User's Guides

- *SmartPlant Fusion Reviewer's Guide* - Provides information such as general conceptual information, procedures, and vocabulary necessary for the reviewer to use the SmartPlant Fusion Quality Control module.
- *SmartPlant Fusion Document Controller's Guide* - Provides information such as general conceptual information, procedures, and vocabulary necessary for the document controller to use the SmartPlant Fusion commands available in the SmartPlant Foundation Desktop Client and SmartPlant Fusion Data Capture Task Manager module.
- *SmartPlant Fusion Viewer's Guide* - Provides information such as general conceptual information, procedures, and vocabulary necessary for the viewer to use the SmartPlant Fusion commands and functionality available in the SmartPlant Fusion Data Capture Task Manager module, SmartPlant Fusion Web Portal and SmartPlant Foundation Desktop Client.
- *SmartPlant Fusion Pre-Processor Utility Guide* – Provides information such as general conceptual information, procedures, and vocabulary necessary for the administrator and document controller to use the SmartPlant Fusion commands available in the SmartPlant Fusion Pre-Processor Utilities module.

Customer Support

For the latest support information for this product, use a World Wide Web browser to connect to <http://support.intergraph.com> (*http://support.intergraph.com*). Also, you can submit any documentation comments or suggestions you might have on the Intergraph support site.

SECTION 1

What's New in SmartPlant Fusion for Viewers?

Version 2016 R1

- You can now view the 2D and 3D documents in the SmartPlant Fusion Web Portal. For more information, see *Working with the SmartPlant Fusion Web Portal* (on page 13). (CR-AM-88736)

Version 2016

- You can now use the **Generate Inconsistency Report** command in the Tag module to create an inconsistency report for the master tags in a Microsoft Excel sheet. This report can be generated for a single tag, as well as for multiple tags. For more information, see *View inconsistencies in master tag properties* (on page 11). (CR-AM-89538, CR-AM-89537, CR-AM-88608)
- You can now use the **Generate Report Command** in the Document and Tag modules to generate a tag document report for the selected items. For more information, see *View master tag properties* (on page 10) and *View documents* (on page 11). (CR-AM-88067)
- You can now view a generated Microsoft Excel report even before saving it to your system. For more information, see *Viewing tag and document properties* (on page 10). (CR-AM-89053)

Version 2015

- You can now use the Fusion Explorer module to view documents and tags that are loaded into the SmartPlant Fusion database. The documents can be viewed in the Document Explorer sub-module, and the tags can be viewed in the Tag Explorer sub-module. You can also do the following:
 - View thumbnails for the documents
 - View the documents and their properties in a list view
 - View the tags and their properties in a list view
 - Use the advanced search to search for specific documents and tagsFor more information, see *Viewing tag properties and documents* (see "*Viewing tag and document properties*" on page 10). (CR-AM-82653, CR-AM-82609, CR-AM-82654, CR-AM-82851)
- In the Document Explorer and Tag Explorer sub-modules, you can select items and use the **Open Items in SmartPlant Foundation Client** command to navigate to the SmartPlant Foundation Desktop Client and view their relationship with the organizational items. For more information, see *Viewing tag properties and documents* (see "*Viewing tag and document properties*" on page 10). (CR-AM-83053)

- In the Document Explorer and Tag Explorer sub-modules, you can use the **Export to Excel** command to export the contents from the current view to an Excel file. For more information, see *Viewing tag properties and documents* (see "Viewing tag and document properties" on page 10). (CR-AM-82999)
- In the Tag Explorer sub-module, you can use the **View Inconsistency** command to view inconsistencies between the Fusion tag and domain tag properties. The inconsistent properties of the tags are displayed in red colored text. For more information, see *View inconsistencies in master tag properties* (on page 11). (CR-AM-79902, CR-AM-84400)
- Chart Reports showing the distribution of documents by the disciplines, document types, projects, and units have been added in the Business Intelligence module. For more information, see *Chart Reports* (on page 27). (CR-AM-84369)
- SmartPlant Fusion is enhanced with the Fusion Viewer web part in SmartPlant Web Portal which removes the dependency on TruView Integrator for SPO/SPE. This indicates that TruView Integrator for SPO/SPE is no more a prerequisite software required for using SmartPlant Web Portal.

Version 2014

- The Fusion Viewer can use the following applications to navigate and display the data in the SmartPlant Fusion database:
 - SmartPlant Foundation Desktop Client
 - TruView Integrator for SPE/SPO Web Portal
 - Business IntelligenceFor more information, see *Viewing documents and drawings in the Web Portal* (on page 17).
- The SmartPlant Foundation Desktop Client can be used to view and navigate the data in SmartPlant Fusion. The system has been set up so that you can find information easily and has SmartPlant Fusion specific menu items. Shortcuts make the navigation more user-friendly and avoid the use of the right-click options. For more information, see *Working with the SmartPlant Foundation Desktop Client* (on page 20).
- The SmartPlant Fusion viewer web part is deployed in TruView Integrator for SPE/SPO Web Portal as part of the installation process. The viewer web part provides a simple view pane, but has access to all of the functionality of SmartPlant Foundation Web Portal. For more information, see *Working with the SmartPlant Fusion Web Portal* (on page 13).
- Ad-hoc Reports and Open XML Reports are available in both the clients, showing document and tag data as lists or as individual reports. For more information, see *View adhoc reports in the Web Portal* (on page 18) and *View Open XML reports in the Web Portal* (on page 18).
- Chart Reports showing all the documents loaded over a time period and the document statuses are also available in the Business Intelligence module. For more information, see *Viewing Business Intelligence reports* (on page 19).

SECTION 2

Viewing tag and document properties

The Tag module allows you to search for tags that are available in the database and view the tag properties.

The Documents module allows you to search for documents that are available in the database and view the document properties and relationships. You can view the thumbnails of the files and also open the actual files in their native application. You cannot view the duplicate documents in the document explorer module.

IMPORTANT You must set the active scope before using the SmartPlant Fusion Data Capture Task Manager module. For more information, see *Setting the active scope* (on page 31)

NOTE You can customize the icons for the sub-modules in the SmartPlant Fusion Data Capture Task Manager module by adding the corresponding GIF files to the [drive]:\SmartPlant Foundation Server Files\Web_Sites\[site_name]\Icons folder.

- The name of the GIF files for the Data Capture Task Manager modules must follow this naming convention: Explorer_DisplayAs. For example, Explorer_Documents.gif for the Documents module.
- The name of the GIF files for the Data Capture Task Manager sub-modules must follow this naming convention: Explorer_GroupName_DisplayAs. For example, Explorer_Tags_Mastertags for the Master Tags sub-module.


What do you want to do?

- *View master tag properties* (on page 10)
 - *View alias tag properties* (on page 11)
 - *View documents* (on page 11)
-

View master tag properties

Master tag patterns and alias tag patterns are defined in the Tag Discovery Pattern module. A master tag pattern can exist by itself or may be related to one or more alias tag patterns. A tag that matches the master tag pattern results in a master tag. The master tag represents an actual object in an engineering plant.


1. Log on to **SmartPlant Dashboard**.
2. Click **Data Capture Task Manager**.
3. Click **Tags > Master Tags**.
4. Search for the master tag that you want to view.
5. Select a value from the **Column Set** box, and then enter the name of the tag in the **Search Master Tags** box to view the properties of the master tag.

NOTE To generate a document report, select a tag, and then click **Generate Report** . A tag document report includes the following: tag properties, documents related to the tag, list of the laser scans related to the tag, and list of alias tags related to the master tag.

View inconsistencies in master tag properties

You can view the inconsistencies in the properties and the property values of a selected tag available in different domains. If the property values of a tag do not match the corresponding values in the domain tag, the tag name and the property values of the tag appear in red.

You can use the **Generate Inconsistency Report**  option to create a tag inconsistency report of the master tags in Microsoft Excel.

1. On the **Master Tags** page, select a value in the **Column Set Only** box.
2. Search for the master tag that you want to view.
3. Select one or more tags from the search results, and then click **View Inconsistency** . The **Tag Inconsistency** dialog box displays the tag information for the first tag selected in the list.



View alias tag properties

A tag that matches the alias tag pattern results in an alias tag. An alias tag does not represent an actual object and is always related to a master tag. It interprets the master object that is represented by the master tag that it is related to.

1. Click **Tags > Alias Tags**.
2. Search for the alias tag that you want to view.

View documents

You can search for documents by name. The search results display the thumbnail of the master file attached to the documents. If a thumbnail does not exist for the master file, then an empty tile is displayed with the document name as the header.

1. Click **Documents**.
2. In the **Search Documents** box, type the name of the document that you want to search for.
3. Click **Search** . The document relationships and all the configured document naming system items are displayed in the grid view.
4. Select one or more documents and then click **Create Content Discovery Task**  to create a content discovery task for the selected documents.

NOTES

- In the **Grid View**, click the name of the file to view the file in the native application.
- Using the thumbnail tile, you can do the following:
 - Click the document name in the header to open the file in the native application
 - Double-click the header to maximize the thumbnail of the file

- To open selected items in SmartPlant Foundation Desktop Client, select the objects in the item list and then click **Open Items in SmartPlant Foundation Client** .
- You can click **Export to Excel**  to export the contents of the current view to a Microsoft Excel file.
- To generate a document report, select a document, and then click **Generate Report** . For more information, see *View an Open XML report in the Desktop Client (on page 24)*.

SECTION 3

Working with the SmartPlant Fusion Web Portal

The SmartPlant Fusion viewer web part is deployed as a part of the installation process. The viewer web part provides a simple view pane, but has access to all of the functionality of SmartPlant Foundation Web Portal. The following web parts are available with SmartPlant Fusion:

- BI Viewer - Allows you to view Business Intelligence reports
- Fusion Only - Allows you to view documents and tags
- Fusion with LaserScan - Allows you to view laser scan files. The Fusion with LaserScan web part is only available when you install TruView Integrator for SPE/SPO.

NOTES

- For more information on using SmartPlant Foundation Web Portal, see *Appendix: Using the SmartPlant Foundation Web Portal* (on page 29).
- The installation location of SmartPlant Fusion Web Portal is available at C:\Program Files (x86)\SmartPlant\Fusion\2016.
- A single .aspx file TruView_NoDisplay.aspx is delivered with SmartPlant Fusion. To view 2D and 3D documents in the Web Portal, type **Fusion2Dand3DView.aspx** into your web browser.
- When you open the SmartPlant Fusion Web Portal, you will be asked to select a module. Select a module, to get to the Login screen.

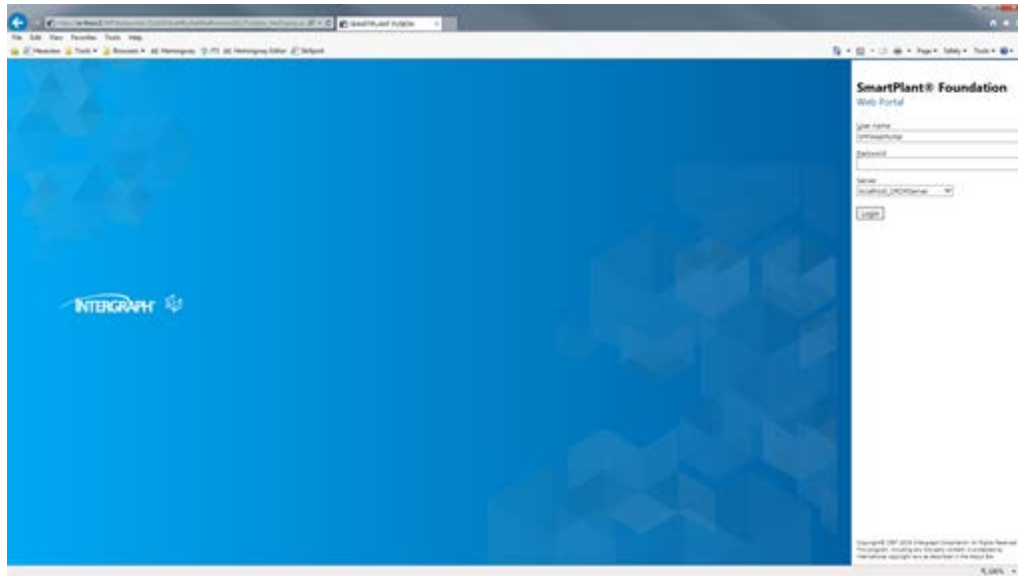
Login Screen

User Name – Enter your user name.

Password – Enter your password.

Server – Select the server to which you want to connect.

Login – Click to log on to the Web Portal.



What do you want to do?

- *Using the search web part (on page 14)*
 - *Using the review web part (on page 15)*
 - *Viewing documents and drawings in the Web Portal (on page 17)*
 - *Viewing reports in the Web Portal (on page 18)*
-

Using the search web part

The SmartPlant Fusion Web Portal **Search** web part allows you to find objects based on specific search criteria. You can perform many types of searches in SmartPlant Fusion, and the results display in the **Discover** web part.

Quick Find toolbar

There are two primary configurations of the **Search** web part. In the default Web Portal, the **Search** web part is configured as a **Quick Find** toolbar. To search for objects, select the kind of object to search for from the **Item Type** list, enter some or all of the object's name in the **Name** box using wildcards if necessary, and then click **Search**. The **Quick Find** toolbar offers the same functionality as the Quick Tab in the full **Search** web part.

The following item types are available for the viewer:

- Fusion Documents and Drawings
- Fusion Tags
- Fusion Reports

Quick tab options

The following wildcards can be applied to searches for fine tuning:

? - Finds any single character

* - Finds any string of characters

% - Performs the same function as *

Item type - Defines the item type you want to query.

Name - Defines the name of the object to find.

Force upper case - Forces text into uppercase for the current search. The default value can be defined on the **User Preferences** dialog box.

NOTE If a search is run with nothing entered in the **Name** box, the * wildcard is applied to the search unless another wildcard or string has been set as the value for the standardSearchParam property in the web.config file for the site. The default value is *. For more information about editing the standardSearchParam property, refer to the *SmartPlant Foundation Web Portal Customization Guide*.

Using the review web part

The **Review** web part displays the currently selected object. You can review the object's properties, related items, and initiate actions (methods) marked as available in the Web Portal. A drop-down list displays the current object. When you click the drop-down list, previously selected objects are listed. You can navigate back to a previous object by selecting it from that list.

If you define values for the **Warning dialog number** and the **Maximum query limit** options on the **Change User Preferences** dialog box, a warning message is displayed when the query result exceeds your warning dialog number but is less than your defined query limit. Click **OK** to continue running the query and display the query results. Or, click **Cancel** to stop the query.

If your **Maximum query limit** is reached, a separate warning message is displayed to inform you that, if returned, your query exceeds your defined query limit value. Click **OK** to display the results. The total results displayed defaults to your defined query limit value. Click **Cancel** to stop the query.

The delivered Review web part contains the following tabs: **Relationships**, **Properties**, and **Actions**. The **Related Items** tab is not available by default, but can be enabled through customization or personalization.

Relationships Tab

The **Relationships** tab displays various relationships to selected items. Click the **Show All Relationships** link in the tree view to display all the relationships that exist among the selected object and other objects.

If you define values for the **Warning dialog number** and the **Maximum query limit** options on the **Change User Preferences** dialog box, a warning message is displayed when the query result exceeds your warning dialog number but is less than your defined query limit. Click **OK** to continue running the query and display the query results. Or, click **Cancel** to stop the query.

If your **Maximum query limit** is reached, a separate warning message is displayed to inform you that, if returned, your query exceeds your defined query limit value. Click **OK** to display the results. The total results displayed defaults to your defined query limit value. Click **Cancel** to stop the query.

Show All Relationships - Allows you to display all the relationships that exist among the selected object and other objects.

NOTE If the shortcut toolbar in the Desktop Client has been made available to you by your administrator, the shortcut toolbar items that you see in the Desktop Client are listed at the top of this tab's command listing with their associated shortcut toolbar icons. All other commands are listed using the system default method (for example, alphabetical order).

Related Items Tab

The **Related Items** tab is not displayed by default. If it is enabled, it displays the items that are related to the selected object.

Actions Tab

The **Actions** tab displays methods that can be invoked against the currently selected item. Only those methods available in the Web Portal are listed.

NOTE If the shortcut toolbar in the Desktop Client has been made available to you by your administrator, the shortcut toolbar items that you see in the Desktop Client are listed at the top of this tab's command listing with their associated shortcut toolbar icons. All other commands are listed using the system default method (for example, alphabetical order).

Viewing documents and drawings in the Web Portal

The SmartPlant Fusion Web Portal **View** web part displays drawings and documents. Smart 3D and PDS models display using the SmartPlant Fusion View Control.

There are several ways you can select a file to view:

- Select a viewable file in the **List** web part
- Select a document with viewable files in the **List** web part
- Click one of the **Viewing Actions** (for example, **View and Markup**) on the **Review** web part **Actions** tab

View drawing and documents

1. In the **Search** web part, select **Fusion Documents and Drawings** in the **Item Type** list.
2. In the **Name** box, type the name or some part of the name of the document or drawing you want to find. You can use wildcards.
3. Click **Search**.
4. Select a drawing or document from the **Search Results** node in the **List** view part.
5. In the **Review** web part, select the **Actions** tab.
6. Click **View Drawing and Documents** to view the drawing or document in the **View Drawings and Documents** web part.

Viewing tags

1. In the **Search** web part, select **Fusion Tags** in the **Item Type** list.
2. In the **Name** box, type the name or some part of the name of the tag you want to find. You can use wildcards.
3. Click **Search**.
4. Select an item from the **Search Results** node in the **Discover** view part.
5. In the **Review** web part, select the **Actions** tab.
6. Click **View Related Documents** to view the tag in the document or drawing where the tag exists in the **View Drawings and Documents** web part.

TIPS

- You can click **View Item in Laser Scan** to view the tag in the laser scan document where it exists in the **View Laser Scan** web part.
- If the selected tag is related to more than one document, then a dialog box appears to allow you to select the appropriate file.

NOTES

- If you select a tag related to a 3D model file and select **View Related Documents**, then the 3D model file (.zvf file) opens in the **View Drawings and Documents** web part, with the selected tag centered in the view. The selected tag is highlighted in the 3D model.

- If a 3D model file is open in the **View Drawings and Documents** web part and the user selects a tag available within that file, then the 3D model display is refreshed to show the selected tag in the center of the view. The selected tag is highlighted in the 3D model.
- You can view the shortcut menu for shared objects when you right-click on a shared object like tag.

Viewing reports in the Web Portal

You can view Ad-hoc reports, Open XML reports, and Business Intelligence reports in the web portal that display document and tag data as lists or as individual reports.

View adhoc reports in the Web Portal

1. In the **Search** web part, select **Adhoc Reports** in the **Item Type** list.
2. In the **Name** box, type the name or some part of the name of the report you want to find. You can use wildcards.
3. Click **Search**.
4. Select an item from the **Search Results** node in the **Discover** view part.
5. In the **Review** web part, select the **Actions** tab.
6. Click **View**, and click **Yes** to confirm that you want to open and save the report.

View Open XML reports in the Web Portal

Reports can be set up to write data into a configured Microsoft Word template. The Office Open XML report can be run from the shortcut menu of an object.

The **Generate Report** command allows you to view the appropriate report for the selected objects. There are three types of reports.

- A document report displays the following:
 - Document properties
 - Master tags and alias tags, extracted from the document
 - A list of files attached to the latest version and that have the viewable property set to True
- A laser scan document report includes the following:
 - Document properties
 - Master tags, extracted from the document
 - A list of files attached to the latest version and that have the viewable property set to True
- A tag document report includes the following:
 - Tag properties
 - A list of the documents related to the tag
 - A list of the laser scans related to the tag

- A list of alias tags related to the master tag

NOTE A tag document report can be generated from a master tag but not from an alias tag.

Generate a report

1. Right-click a document, and click **Generate Report** on the shortcut menu.
2. In the **File Download** dialog box, click **Open** to view the report in Microsoft Word.

TIPS

- You can click **Save** to save the document report in the file system.
- You can generate a laser scan document report from a laser scan document object or a tag document report from a master tag object.

Viewing Business Intelligence reports

From the **Select a report to run** list, select the report that you want to view. The report is displayed in the **Business Intelligence Report** web part.

NOTE If you select additional reports, each report you select is displayed on its own tab in the **Business Intelligence Report** web part. The name of each tab matches the name of the report.

SECTION 4

Working with the SmartPlant Foundation Desktop Client

The SmartPlant Foundation Desktop Client can be used to view and navigate the data in SmartPlant Fusion. The system has been set up so that you can find information easily and has SmartPlant Fusion specific menu items. Shortcuts make the navigation more user-friendly and avoid the use of the right-click options.

What do you want to do?

- *Viewing documents and drawings in the Desktop Client* (on page 20)
 - *Viewing Ad-hoc reports in the Desktop Client* (on page 22)
 - *Viewing Open XML reports in the Desktop Client* (on page 24)
-

Viewing documents and drawings in the Desktop Client

The document discovery functionality ensures that the files that satisfy the rules provided by the user with administrator rights in the document discovery pattern are selected and loaded into SmartPlant Fusion. For each file that resolves to a unique document name, SmartPlant Fusion creates the new document and attaches the file to the document version. When multiple files resolve to the same document name, the document is created and all the matching files are attached to the document version as duplicate files. These duplicate files must be resolved and one master file must be selected before you can run a content discovery task.

Find documents and drawings

When you search for documents, SmartPlant Fusion displays a list of documents that were created in the document discovery task and have files attached to it.

1. Click **Find > Fusion Items > Documents**.
2. On the **Find** dialog box, type the name or some part of the name of the document you want to find. You can use wildcards.
3. Click **OK**.

NOTES

- You can right-click a document and click **View Related Items** on the shortcut menu to view the objects related to it.

- You can right-click a document and click **Show All Files** on the shortcut menu to view the files attached to the selected document.

View files attached to processed documents

Documents with status set to **Document Processed** are processed with various readers in the content discovery task. The files attached to a processed document will vary depending on the SmartPlant Fusion reader through which it is processed.

The following list shows the files attached to documents processed by different readers:

- **Drawing reader** - The original file is attached to the processed document. The navigation file is attached to the original file. If the preprocessed content file is used, then the XML content file is also attached to the original file.
- **Document reader** - The original file is attached to the processed document. The content file, in XML or text format, is related to the original file.
- **Image Reader** - The original file is attached to the processed document. The PDF file and the content file, in XML or text format, generated by the third-party OCR engine are related to the original file.
- **3D Model Reader** - The original file is attached to the processed document. The content file, in XML or text format, is related to the original file.
- **LaserScan Reader** - Only the original file is attached to the processed document.
- **Text Reader** - Only the original file is attached to the processed document.

NOTES

- Regardless of the type of reader, every processed document will always have the original file processed by the reader attached to it.
- The number of files related to the original file that is processed by the image reader depends on the output files generated by the third-party OCR engine.

View relationships for processed documents

On successful completion of the content discovery task, any attributes defined on the document are converted into relationships. While creating a document, it is possible to set parts of the file name as properties. In addition to this, properties can be also set by the readers.

View the items related to the documents

1. Right-click a document with status set to **Tag Data Extraction Passed**.

TIP You can view the client parameters and document parameters for the document in the **Properties** window. The client and the document parameters are set in the map file. For more information on the client parameters and document parameters, see *Document Naming System (DNS)* in the *SmartPlant Fusion Administrator's Guide*.

2. On the shortcut menu, click the applicable **Show** command for the relationships you want to view.

View the related documents in the configuration tree

1. Right-click an object in the tree view, and click the applicable **Show** command on the shortcut menu. For example, right-click on **Fusion Project Codes**, and select **Show Project Codes** on the shortcut menu.
2. Right-click an item in the sub-node, and click **Show Documents** on the shortcut menu. For example, right-click on **Project1**, and click **Show Documents** on the shortcut menu to view the related documents.

NOTE If the attribute defined in the DNS for the document matches an existing object in the database, then a relationship is created. For example, if the attribute Unit (SPFNUnit) is populated on the document and the same functional unit is defined as an object in the database, then a relationship of type SPFNDocumentUnit is created between the document and the unit.

Viewing Ad-hoc reports in the Desktop Client

Ad-hoc reports provide a fast way to view plant information. The format, or layout, of a report is fully configurable. You can save these layout definitions as custom reports that you can reuse.

As part of creating and running a report, you select an existing report template. The items displayed are based on the report template that you selected. The report template, which is defined by an administrator in SmartPlant Foundation Desktop Client, includes a view definition and a Microsoft Excel file. The view definition determines what objects, relationships, and properties are to be included in the report. The Microsoft Excel file specifies the layout of the report. For more information about creating report definitions, see the *How to Configure Reports* guide.

For more information about creating ad-hoc reports, see *Ad-hoc Reports* in the *SmartPlant Foundation Desktop Client User's Guide*.

Fusion Document Status Report - This report provides the document details of the documents available in the SmartPlant Fusion database that match the criteria provided during the report generation.

Fusion Document Discovery Task Report - This report provides the details of all the document discovery tasks with their details that are available in the SmartPlant Fusion database, that match the criteria provided during the report generation.

Fusion Content Discovery Task Report - This report provides the details of all the content discovery tasks with their details that are available in the SmartPlant Fusion database, that match the criteria provided during the report generation.

Fusion Document Quality Control Report - This report provides the details of missing document attributes, missing document relationships, and on document attribute and document relationship mismatch.

NOTES

- The document status report output is an Excel file which gets exported as Fusion Document Status Report.xlsx.
- The records within the report are by default sorted by the document names listed in it.
- If you have added additional parameters in the Document Naming System module, use the **Edit Report Definition** command to add them in the reports. For more information about editing report definitions, see *Ad-hoc Reports* in the *SmartPlant Foundation Desktop Client User's Guide*.

Run Ad-hoc report

1. Click **Find > Reports**.
2. Type ***Fusion*** in the search box, and click **OK**.
3. Right-click the report to view.
4. On the shortcut menu, click **Run Report**.
5. Click **Open** or **Save** on the **File Download** dialog box. Depending on the type of report and how the report was configured, the **File Download** dialog box may appear.

NOTE The **Prompt for Values** dialog box allows you to enter criteria for the document name and document status. It is not mandatory to provide filter criteria during the report generation. If you do not provide any filter criteria, then the report will display the document status report for all the documents available in the SmartPlant Fusion database.

Run document discovery task report

1. Click **Find > Reports**.
2. Type **Fusion Document Discovery Task Report** in the search box, and click **OK**.
3. Right-click the report to view.
4. On the shortcut menu, click **Run Report**.
5. Click **Open** or **Save** on the **File Download** dialog box. Depending on the type of report and how the report was configured, the **File Download** dialog box may appear.

NOTE The **Prompt for Values** dialog box allows you to enter criteria for the document name and document status. It is not mandatory to provide filter criteria during the report generation. If you do not provide any filter criteria, then the report will display the document status report for all the documents available in the SmartPlant Fusion database.

Run content discovery task report

1. Click **Find > Reports**.
2. Type **Fusion Content Discovery Task Report** in the search box, and click **OK**.
3. Right-click the report to view.
4. On the shortcut menu, click **Run Report**.
5. Click **Open** or **Save** on the **File Download** dialog box. Depending on the type of report and how the report was configured, the **File Download** dialog box may appear.

NOTE The **Prompt for Values** dialog box allows you to enter criteria for the document name and document status. It is not mandatory to provide filter criteria during the report generation. If you do not provide any filter criteria, then the report will display the document status report for all the documents available in the SmartPlant Fusion database.

Viewing Open XML reports in the Desktop Client

You can run reports to write data from the database into configured Microsoft Word templates, created and implemented by your administrator.

View an Open XML report in the Desktop Client

The **Generate Report** command allows you to view the appropriate report for the selected objects. There are three types of reports.

- A document report displays the following:
 - Document properties
 - Master tags and alias tags, extracted from the document
 - A list of files attached to the latest version and that have the viewable property set to True
- A laser scan document report includes the following:
 - Document properties
 - Master tags, extracted from the document
 - A list of files attached to the latest version and that have the viewable property set to True
- A tag document report includes the following:
 - Tag properties
 - A list of the documents related to the tag
 - A list of the laser scans related to the tag
 - A list of alias tags related to the master tag

NOTE A tag document report can be generated from a master tag but not from an alias tag.

Generate a document report

1. Click **Find > Fusion Items > Fusion Documents**.
2. In the **Find** dialog box, type the name or some part of the name of the document you want to find. You can use wildcards.
3. Click **OK** to find objects with the criteria you specified.
4. Right-click a document, and click **Generate Report** on the shortcut menu.
5. In the **File Download** dialog box, click **Open** to view the report in Microsoft Word.

TIPS

- You can click **Save** to save the document report in the file system.
- You can generate a laser scan document report from a laser scan document object or a tag document report from a master tag object.

View a report

1. Right-click a document that already has a document report attached to it.
2. Click **View Report** on the shortcut menu to open the report in Microsoft Word.

Show a report

1. Right-click a document that already has a document report attached to it.
2. Click **Show Report** on the shortcut menu to display the results of the report in the list view.

Save a report in the Desktop Client

1. Right-click the document version for which you want to save a local copy of the attached files, and click **Files > Save Target As**.

TIPS

- From the list, select each file that you want to copy.
 - If a file references other files, the **Save Target As** command also copies all its referenced files to your computer.
2. Specify where you want the software to place the local copy of the file in the **Path** box.
 3. Click **OK**.

SECTION 5

Working with the Business Intelligence

The SmartPlant Business Intelligence is delivered and installed with SmartPlant Foundation Desktop Client version 2014, and higher, and provides a convenient way to easily produce summary statistical information from your database. SmartPlant Foundation data warehouse information can be displayed as graphical chart reports, which you can drill down for further details. The SmartPlant Business Intelligence is powered by the same viewing technology as the existing SmartPlant Foundation Desktop Client ad hoc reports.

What do you want to do?

- *Open the Business Intelligence module (on page 26)*
 - *Chart reports (on page 27)*
-


Open the Business Intelligence module

Click the **Business Intelligence** panel in SmartPlant Dashboard to start SmartPlant Business Intelligence.



NOTES

- You can select tool commands from the main toolbar to perform various actions, such as creating a new chart report or editing existing chart reports.

- More than one chart report can be displayed in the graphics results pane. You can alternate between reports by clicking on each tab.
- You can view, resize, print, and export the chart report in the graphics results pane, as well as drill down to see more detailed information on the properties displayed in the chart report.
- Click **Minimize**  to reduce the **Reports** pane to a side tab. This lets the displayed chart report result fill the application window. Click the tab to expand the reports pane into the main application window.

For more information about the Business Intelligence module, see *SmartPlant Foundation Business Intelligence User's Guide*.

Chart reports

You can configure chart reports using the Business Intelligence module to view the information available in the SmartPlant Fusion database. After the installation of SmartPlant Fusion, you can view two SmartPlant Fusion specific chart reports in the Business Intelligence module.

- **Document Status Report** - This chart report displays all the document statuses as categories and the number of documents against each category is represented by discrete value.
- **Reader and Document Status Report** - This chart report displays all the SmartPlant Fusion readers as categories and the number of documents processed by each reader grouped by document statuses.
- **Document Report By Discipline** - This chart report displays all the disciplines as categories and the number of documents against each category is represented by discrete value.
- **Document Report By Document Type** - This chart report displays all the document types as categories and the number of documents against each category is represented by discrete value.
- **Document Report By Project** - This chart report displays all the projects as categories and the number of documents against each category is represented by discrete value.
- **Document Report By Unit** - This chart report displays all the units as categories and the number of documents against each category is represented by discrete value.

Document Status Report

This report allows you to categorize documents depending on their statuses for a given period of time.

You can define criteria for the following properties:

- **Name** - Represents the name of the document.
- **Last Updated Date** - Indicates the date on which the document was last updated.

Reader and Document Status Report

This report allows you to categorize documents depending on the SmartPlant Fusion reader that has been used for processing the documents. This report also groups the documents with the same document status for each reader type.

You can define criteria for the following properties:

- **Name** - Represents the name of the document.
- **Last Updated Date** - Indicates the date on which the document was last updated.

Document Report By Discipline

This report allows you to categorize documents depending on their relationship with disciplines.

Document Report By Document Type

This report allows you to categorize documents depending on their relationship with document types.

Document Report By Project

This report allows you to categorize documents depending on their relationship with projects.

Document Report By Unit

This report allows you to categorize documents depending on their relationship with units.

NOTE For more information on creating and editing chart reports, see *SmartPlant Foundation Business Intelligence User's Guide*.

APPENDIX A

Appendix: Using the SmartPlant Foundation Web Portal

SmartPlant Fusion uses the Web Portal for viewing the data available in the SmartPlant Fusion database. You can view the documents and drawings, reports, tags, and laser scan images available in the SmartPlant Fusion database. You can select a tag and navigate to its related documents.

NOTE For more information on using the web portal, see *Using the SmartPlant Foundation Web Portal* in the *SmartPlant Foundation Web Portal User's Guide*.

Based on the software configuration and user privileges, you can perform many functions including:

- View information from the database about a specific object or categories of objects
- Search for objects in the database
- View drawings and 3D models
- View a history for a particular object
- View relationships between objects

Get to know the Web Portal interface

NOTE Because the SmartPlant Foundation Web Portal is designed to be customized, your default Web Portal page may differ from what is described here. Contact your system administrator for information about any customizations performed on your Web Portal. For more information about customization, refer to the *SmartPlant Foundation Web Portal Customization Guide* and to the *SmartPlant Foundation Web Portal API and Programmer's Guide* delivered with the SmartPlant Foundation programming documentation.

Login screen

User name - Enter your user name.

Password - Enter your password.


Server - Select the server to which you want to connect.


Login - Click to log on to the Web Portal.


NOTE If your system is configured for automatic logon, then the software automatically logs you on to SmartPlant Foundation using your Windows user name when you open the Web Portal.


Web Portal toolbar


The toolbar displays icons and information using ToolTips. To view the ToolTips, move your mouse pointer over the icon and pause. The ToolTip displays near your mouse pointer.


 **You are logged in as <username>** - Displays the **Change Password** dialog box. Move your mouse over the icon without clicking it to display a tooltip containing the current user name. For more information, see *Change user password* (on page 30).


 **Effective Date** - Displays the **Effective Date** dialog box. Use this dialog box to define the effective date and time to use for viewing data. You can view data from the SmartPlant Foundation database as the data existed at a particular time in the past. Options include **Now** or you can define a specific date and time. Move your mouse pointer over this button to display a tooltip containing the current settings. For more information, see *Specify an effective date and time for viewing data* (on page 34).

 **User Preferences** - Displays the **Change User Preferences** dialog box. Options include query limits, defining units of measure, displaying hidden files, and so forth. For more information, see *Set Web Portal preferences* (on page 34).


 **Query Scope** - Displays your current query configuration and active role. Use this dialog box to change the query scope used when retrieving data. If you change the scope, the currently displayed data is discarded and data matching the new scope displays in the web parts. Hover your mouse pointer over this button to display a ToolTip containing the current settings. For more information, see *Setting the active scope* (on page 31).

 **About** - Displays the currently installed version of SmartPlant Foundation, the server URL being used, links to technical support, and so forth.

 **Help** - Displays the Help file. The Help contains procedures, reference information, and conceptual overviews that can be accessed through a table of contents, keyword index, or full text search engine. You can also get context-sensitive information in the software by pressing F1.

 **Login / Log Off** - Click **Login** to begin using the software or click **Log Off** to exit the software.

Change user password

You can change your password by clicking  **Logged in user** on the toolbar. To see the currently logged in user name, move your mouse over the icon to display the user name in a ToolTip.

You can also change your password by clicking the **Change User Password** link in the **Change User Preferences** dialog box.

Change Password Dialog Box

Allows you to change the password for the current user.


User name - Displays the user name for the current user. This option is read only.

Enter old password - Type the password that you want to change.

Enter new password - Type the new password.

Confirm new password - Retype the new password.

Setting the active scope

The **Set Active Scope**  command defines the active scope used for all data retrieval. To view your current setting, move your mouse pointer over the **Set Active Scope** icon. Your current settings display in a ToolTip.

IMPORTANT The effective date must be set to *Now* in order to set the active scope.

NOTES

- Your query scope determines the configuration in which you want to search for data.
- Your role determines the features and commands available in the selected configuration.
- Your create scope determines the configuration in which you can create and update objects.
- In the Web Portal, when you set the active scope, this setting applies to both your query scope and your create scope setting.

TIP When you set your active scope to multiple configurations, the first configuration in the query scope list is also set as your create scope and is displayed in the Discover web part. If you want to change the create scope setting to another of the configurations in your query scope setting, you must first clear the entire query scope, and select only that configuration as the query scope setting, which also sets it as the new create scope setting. After setting the active scope to this single configuration, you can then re-open this dialog box and select the remaining configuration items that you want in your query scope. As long as the initial configuration remains selected, the create scope is unchanged by adding more configurations to the active scope.

Set Active Scope Options (Default view)

Query scope - Displays configurations in SmartPlant Foundation represented by a tree of related Plant Breakdown Structure (PBS) objects.

Select All Top Level Configurations - Selects all top configuration items.

Clear Query Scope - Clears the currently selected Query Scope configurations.

Select Sub-Config for Checked Items - Selects the next lower level configuration items of any currently selected configuration item. For example, if Plant A is selected and has a sub-configuration Project 1, Project 1 is selected and Plant A is cleared. If a selected configuration is at the lowest level in its configuration hierarchy, its selection remains unchanged.

Status filter - Defines the scope status for the query.

Query by selected configurations only - Restricts queries to the currently selected configurations only and not higher configuration levels.

Set create configuration to 'Scope Not Set' - Sets the create scope setting to **Scope Not Set** regardless of the query scope setting, and displays the Configuration Top level in the Discover web part.

Set Active Scope Options (Expanded view)

NOTE The expanded view of the **Set Active Scope** dialog box must be enabled by your administrator. For information on customizing the Web Portal, see the *SmartPlant Foundation Web Portal Customization Guide*.

Set active configuration by query - Defines a query scope that is used for all data queries and relationship expansions. When you set the active configuration by query, the available roles are filtered by the selected query scopes.

Set active configuration by roles - Defines a query scope based on selected roles. When you set the active configuration by roles, the available query scopes are filtered by the selected roles. Setting the configuration by role is useful if you have two or more roles in your organization and you need to work in one of those roles across projects. The list of roles contains all of the roles to which you have access. As you select roles, the list of available configurations changes to show all of the configurations in which you have the selected roles. A configuration is displayed only if you have access to *all* of the selected roles in that configuration.

NOTE When you choose to set the active configuration either by query or by roles, the act of selecting the option changes the order in which the Query Scope and Selected Roles sections of the dialog box are displayed. Otherwise, the available options are the same.

Query scope - Displays configurations in SmartPlant Foundation represented by a tree of related Plant Breakdown Structure (PBS) objects.

Select All Top Level Configurations - Selects all top configuration items.

Clear Query Scope - Clears the currently selected Query Scope configurations.

Select Sub-Config for Checked Items - Selects the next lower level configuration items of any currently selected configuration item. For example, if Plant A is selected and has a sub-configuration Project 1, Project 1 is selected and Plant A is cleared. If a selected configuration is at the lowest level in its configuration hierarchy, its selection remains unchanged.

Status filter - Defines the scope status for the query.

Query by selected configurations only - Restricts queries to the currently selected configurations only and not higher configuration levels.

Set create configuration to 'Scope Not Set' - Sets the create scope setting to **Scope Not Set** regardless of the query scope setting, and displays the Configuration Top level in the Discover web part.

Selected roles - Click to define roles to be used in the selected configurations. (This section appears at the top of the window when **Set active scope by roles** is selected.)

Clear All Roles - Clears the currently selected roles.

Select All Roles - Selects all role items.

What do you want to do?

- *Set the active scope by query* (on page 33)
 - *Set the active scope by roles (expanded view only)* (on page 33)
-

Set the active scope by query

1. Click **Set Active Scope** .

NOTE If using the expanded-view version of the **Set Active Scope** dialog box, select **Set active configuration by query**.

2. From the **Status filter** list, select one or more lifecycle status filters to filter the **Query scope** configuration tree list.

NOTES

- By default, only the **Active** filter is selected so that only active configurations are displayed in the list.
- To display other configurations in the list, such as configurations for newly created, merged, or completed projects, select the appropriate filter.
- You can use the **Query by selected configurations only** option to restrict queries to only the selected configurations and not higher configurations. For example, if you select Project1 in PlantA with this option checked, your queries will return only data from Project1, not from PlantA.

3. In the **Query scope** list, check the box beside the configuration(s) in which you want to search for objects.

TIPS

- To select all top configuration items, click **Select All Scope**.
- To clear all selections, click **Clear Query Scope**.

NOTE Only configurations to which you have query access appear in the list.

4. Click **OK** to save your changes.

Set the active scope by roles (expanded view only)

IMPORTANT This procedure is available only with the **expanded-view** version of the **Set Active Scope** dialog box, which must be set up by your administrator.

1. Click **Set Active Scope** .

2. In the **Set Active Scope** dialog box, select **Set active configuration by roles**.
3. Select the appropriate user role or roles from the **Selected roles** list.

NOTE The roles in the list are all of the roles available to you. Your role selection determines the configurations that are available in the **Query scope** list.

4. In the **Status filter** box, select the lifecycle status filter(s) for the configurations.


NOTES

- By default, only the active configurations are displayed in the list.
- To display other configurations in the list, such configurations for newly created, merged, or completed projects, select the appropriate filter.

- You can use the **Query by selected configurations only** option to restrict queries to only the selected configurations and not higher configurations. For example, if you select Project1 in PlantA with this option checked, your queries will return only data from Project1, not from PlantA.
- 5. In the **Query scope** list, check the box beside the configuration(s) in which you want to search for objects.

NOTE Only configurations to which you have query access appear in the list.
- 6. Click **OK** to save your changes

Specify an effective date and time for viewing data

You can specify an effective date and time to use for viewing data using the **Effective Date**  command. You can set the controls to view data from the SmartPlant Foundation database as the data existed at a particular time in the past. Options include **Now** and setting a specific date and time. To view your current setting, move your mouse pointer over the **Effective Date** command. Your current settings display in a ToolTip.

Effective Date Options

Show data available

Now - Sets the current date and time to use for viewing data.


On - Allows you to set a specific date and time. You must set the date and time using **Selected date** and **Selected time**.

Specified date and time

Selected date - Set the effective date by keying in a date or click the calendar icon. If you click the calendar icon, a calendar displays allowing you to select a date or navigate to a different month or year.

Selected time - Set the effective time by keying in a time or click the clock icon to set the time to the current time. If an invalid time is entered, the field's background color changes as a warning.

Set Web Portal preferences

The **Change User Preferences**  command allows you to set a maximum query limit, a default unit of measure, a hidden files option, and so forth.

NOTE The effective date must be set to *Now* in order to update user preferences.

Change User Preferences Options

General Preferences

Warning dialog number - Sets the number of results to find in a query before the software displays a warning. The warning dialog number must be less than the maximum query limit.

Maximum query limit - Sets the upper limit for the number of items found in a query.

Default UOM - Sets the default unit of measurement that will be used to display data in the **Properties** and list view windows and dialog boxes that display object data. This setting allows

you to select a display set, typically **Imperial** or **Metric**. If a default setting is not selected, the value appears as it was stored in the database.

Picklist item display - Specifies whether item names, descriptions, or both appear for list box values in the user interface.

Format type for e-mail digest - Choose the format for receiving e-mail digest messages, if applicable. Choose between HTML and text formats. Each e-mail forming part of the e-mail digest can have HTML links; these links can be turned on or off depending on this setting.

E-mail digest duration in hours - Indicates the number of hours for which you want to include notifications in each e-mail digest message. For example, if you set this value to 4, you will receive one e-mail message every 4 hours that includes notification messages for the previous 4 hours.

Show description in tree - Specifies whether the description of an item will appear after the name of the item in the tree view.

Show hidden files - Turns the display of hidden files on or off.

Force Uppercase in Quick search - Indicates that text should be forced into uppercase when using **Quick Find**.

Display internal object names - Displays the internal object names.

Display internal names for user interface - Displays the internal names for items used in the graphic user interface.

Turn on Look Ahead - Allows you to see the number of related objects in parentheses beside expansion headings in the tree view that display particular relationships.

Case sensitive quick find - Allows you to find objects in the database using case-sensitive quick finds. In a case-sensitive search, the software searches for objects that match the case of the text you type (upper case, lower case, or mixed case). This option applies to the **Quick** and **Find** tabs of the **Search** web part.

Maximize external file viewing windows - Indicates that when you view a drawing or model in a separate window, the window is maximized. This option is only applicable when the Web Portal is configured to view drawings and models in a separate SmartPlant Markup Plus window.

Turn off look ahead on filtered and multi-path relationship (edge) expression - Turns off the look ahead feature on shortcut menu options that apply to relationship expansions that traverse multiple objects (using edges).

Page all search results, rows per page - Allows you to enable paging of all search results in the **List** web part, and sets the rows displayed per page to the value entered in the box beside this option. By default, paging is enabled with a value of 15 rows per page.

3D Viewing Preferences

3D model folder - Defines the location for .VUE files. By default, this option is blank until you define a location.

Streamed 3D data folder - Defines a cache location for streamed 3D data files. By default, your temporary internet files folder is used to cache 3D data files. Specifying **none** turns off the caching.

View Item in Model Symbology - Selected items

Color - Choose the display color for the selected item(s). From this list box, you can choose to use the native color, as defined in the drawing, or choose **Custom**, and click the corresponding box to choose the color you want to use for matching items.

Line weight - Choose the display line weight for the selected item.

Line style - Choose the display line style for the selected item. You can choose to use the native style from the drawing or select from a number of other line styles.

Render mode - Choose how you would like to have selected items display. You can have items display with the render defined in the original drawing, or you may choose to have them displayed as outlines or as solid objects with shading.

View Item in Model Symbology - Other Items

Display - Allows for the display of non-selected items. If this check box is not selected, only the selected will appear in the display.

Color - Choose the color in which the non-selected items display. From this list box, you can choose to use the native color, as defined in the drawing, or choose **Custom**, and click the corresponding box to choose the color you want to use for non-selected items.

Line weight - Choose the line weight you want to use to display non-selected items.

Line style - Select a line style to be used to display non-selected items. You can choose to use the native style from the drawing or select from a number of other line styles.

Render mode - Choose how you would like to have non-selected items display. You can have items display with the render defined in the original drawing, or you may choose to have them displayed as outlines or as solid objects with shading.

Change User Password - Displays the Change Password dialog box to change the password of the currently logged on user.

Reset User Personalization - If any customization has been made to the Web Portal display, it is removed and the delivered default values return. Using this option closes your Web Portal session. You must log in again.

Glossary

3D reader

Validates tags, creates and cross-references the tags to the documents, and extracts visual file and tag data from the 3D models.

alias tag

A tag that is named differently, but represents the master tag in the system.

business objects

Complex objects representing more than one class definition.

content discovery task

Extracts content from the master file, creates and relates, relates master and alias tags to the documents, and relates documents to the organizational items.

database domain discovery task

A process that uses a defined database reader pattern to connect to a database and extract documents and tags along with their properties as defined within the pattern.

database reader

Reads data directly from a database. Administrators can define specific tables and fields to be transferred so that they can be used for data comparisons.

database reader pattern

Defines the database tables and properties that need to be extracted and mapped to classes and properties within SmartPlant Fusion.

delimiter

Identifies the end of a tag.

document attribute

A constant which allows additional information to be added to the data created in SmartPlant Fusion.

document discovery

Reads documents (typically office generate files) and using patterns loads them into SmartPlant Fusion.

document discovery pattern

Defines the base directory that needs to be crawled, the file name pattern to extract and the document name pattern that needs to be created. Additionally, document attributes can also be defined.

document discovery task

A process that uses a document discovery pattern to crawl a directory system and load documents and files that match the specified file pattern. After which thumbnails are created and related to the document.

document index

A defined excel list or a defined data object within SmartPlant Fusion that defines metadata about a file. This is referenced when files are loaded into the system and if a match is found the file will be loaded with the properties defined from the document index.

document name pattern

Defines a document name for files with a specific file name pattern comprised of the parts, constants, and documents attributes.

document naming system

Defines the parts of a file name. Additional information can be defined to define constants and relate them to existing objects in the database when data extraction occurs.

domain tag

A representation of the tag, specifically from a discipline within a domain.

drawing reader

Extracts cross-referenced and linked information contained in a drawing file.

duplicate document

A document with multiple files attached but different file types or multiple versions of the same document attached to it.

file index

Specifies the file name, associated name, and attributes for a document before it is processed by the document discovery task.

file name parts

Sections that represent data in a file name.

file name pattern

Consists of one or more file parts with each file part being defined as a document naming system item.

file properties or attributes

Values that are stored on the file object. The data is transferred to the document if the file is selected for data extraction.

hotspotting

Hyperlinks in a document on the area where the tag exists in the file.

image reader

Extracts tag and other related information contained within any image using an Optical Recognition (OCR) engine.

laser scan reader

Captures Leica TruView HDS information created from plant scans.

master file

The file that is used for data and content extraction.

master tags

Extracted tags that follow a set of standard naming conventions in a project or a plant that the engineers should follow for defining tag names.

orphan tags

Tags that are not related to any document or domain tag.

property group

A group of properties.

property list

Allows you to create property group names (interface definition names) and properties (property definitions), which can be related to a business object (class definitions).

regular expression

A pattern that is used for tag matching and defining selected file parts.

separator

Separates file parts and tag parts. Common separators include a dash (-), slash (/), tilde (~), and so forth. For example, the instrument tag LCV-157 uses the separator to separate the tag name (LCV) from the drawing name (157).

tag discovery pattern

Used to extract the master and alias tags from the content of a master file.

tag naming system

Defines the parts of a tag name and relates them to existing objects in the database.

text reader

Captures simple text files and processes the data directly without needing an application to extract the data.

thumbnail

A small size image representation of a larger file intended to make it easier and faster to manage it.

thumbnail rendition

Generates .png images for various file extensions.

title block

The portion of a drawing that contains information about the drawing, such as who created the drawing, when it was created, who approved it, and so on. The type of information included in the title block varies by drawing type, industry, and organization.

transpose

Returns a vertical range of range of cells as a horizontal range, or vice versa.

UoM

A unit of measurement.

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