TRAY BILL OF MATERIALS USING REPORT VIEWS
(best, report contains only items shown in the view)

1. Create then open a new electrical (composed) drawing for Edit (<u>done while in a 3D task</u>)

2. Create a drawing view and associate it to a 3D volume as normally done. Use view style "E Cable Tray Plan (E)"

3. Select the Insert Report View command and define the view outline on the drawing

4. The Report Properties form pops up. Define the report similar to this and OK:

    a. Name: TrayRpt1

    b. Description: testing reports

    c. Report Template: more…>Reports>Types of Reports>Electrical>Shaw>DW-CABLETRAY-BOM (RP-CABLETRAY-BOM is available for Cliffside RP building tray orthos)

    d. Report Output Format: Native text boxes

5. Select the new view

6. Select Associate Objects to View command

7. Bring the 3D environment to the front. Notice the prompt: "Select a drawing view to associate to the Report view"

8. From the pulldown named "View" on the top left of 3D environment select the drawing view to associate to the report

9. Select Finish and go back to 2D editor

10. Exit the 2D editor and select Yes to saving changes

11. Switch tasks to Drawings and Reports

12. Navigate to the newly created ortho drawing

13. Right click the drawing and select Update Now

14. The resulting drawing should have a view for cable tray graphics and another view with a bill of materials corresponding to the tray parts in the graphic view

TRAY BILL OF MATERIALS ATTACHMENT TO ORTHOS
as embedded object from an external excel file

1. In Drawings and Reports Go to 120631/00/65/MISC/Reports/Spreadsheet Reports

2. Right-click on either DW-CABLETRAY-BOM or RP-CABLETRAY-BOM and select
   Update-now

3. To review the results, double click the report and the Excel report will open. Exit without
   saving after reviewing

4. To save a copy of the report you can manipulate and attach to a drawing, right-click a
   report and select Save-as…

5. In the save form, set the Output Folder to an easy to find location, eg. My Documents

6. Select OK, no need to uncheck the File Types, SP3D will know to save only the *.xls file

7. Save-As will report "Saved 1 document…" go to the output folder and open the report.
   The report file name is the same as the report name in Drawings and Reports

8. This report is independent from the report in the database, so that it can be edited if
   needed for format as desired, for example:

   a. Select the values under PART NO and make them Bold

   b. Adjust the width size of the columns if too wide for the values

   c. Make the QTY columns center-justified or right-justified

   d. Multi-Select all description cells, right-click and select Format Cells, set
      Alignment's Text control to Wrap text. Then adjust the width of column D so that
      descriptions are 2 lines or less

   e. For improved/cleaner display, select Tools>Options… and in the View tab turn
      off Gridlines display. Save and exit

   f. Note. Until fix is received from Intergraph, before exiting you may need to convert
      the Linear QTY from displayed meters to ft-in. Optionally, if only one Qty column
      is desired, you can replace straight tray lengths into the QTY column, which by
      default shows the number of straight parts processed

9. In Drawings and Reports, open the SP3D ortho dwg where the BOM report will be embedded

10. In Shape2D, select Insert>Object

    a. In insert object form, select Browse… and select the excel file with the BOM worked on in the previous steps

    b. Turn off the Link box to cause the report to be embedded in the drawing and OK

    c. A frame for the report appears attached to the report, click on the area of the drawing where the report should be added

11. Click the new report to activate the handles display

12. Click and drag the right middle handle to trim the width of the report

13. Click and drag the corners to adjust the size of the report

14. You can right-click and select Edit Object options to modify the content of the report in Excel, but beware that sometimes it is possible to have problems getting the desired display after this manipulation

15. Exit the drawing, say YES to saving the changes

16. Right click the drawing name in Drawings and Reports and select Save As…

17. Set the output folder to your desired location and OK. System will report having saved 1 document, which is the .sha file

18. To save to Microstation, enter the .sha drawing just saved and select File>Save As…

19. In Save as type pulldown select Microstation, then click Save

20. The drawing is saved as one Microstation file with attachments, one of which is a .tif file containing the materials list. You may optionally want to copy the graphics from the embedded dgn files into the main one so as to have only one dgn file to deal with

21. Different graphics types are placed in different levels, so it is possible to mass edit graphics to make lines thinner, colors lighter, etc. prior to delivery to the customer.