This White Paper gives step by step directions for creating the necessary filters and data group to create a Report Job that will run every 12 hours and display all part files that contain data that was collected within those last 12 hours.

Creating a Record Filter

The first step in this process is creating a Record Filter that will be used to determine which characteristics contain data that was processed in the last 12 hours.

1. On the Data View tab click the blue + in the Record Filters panel.



- 2. Enter the Filter Name at the top of the screen (I used "Last 12 Hours").
- 3. In the Filter On list choose "Measure Date/Time".
- 4. In the Comparison column choose "is in the last".
- 5. Enter "12" in the Criteria column.
- 6. Choose "Hours" in the last column.
- 7. Click OK to create this filter.

D Record Filter Editor	×
To create your filter, select the filter fields and criteria below so the filter completes the following sentence: Show me the data where the following criteria	iteria is true.
Filter Name: Last 12 Hours Ac	d Criteria Remove Criteria
AND/OR (Filter On: Comparison: Criteria: Measure Date/Time V is in the last V 12 Hours)
Show Advanced	<u>O</u> K <u>C</u> ancel

8. You can test this filter by opening a part file that you know contains data collected in the last 12 hours and clicking on that record filter in the panel. The data shown in the grid on the right should all be within the last 12 hours.

Creating a Characteristic Filter

1. Use the **Characteristic Filters** tab (next to the **Part Files** tab) at the top of the **Data View** area and click the blue + button to create a new characteristic filter.



- 2. Enter the Filter Name at the top of the screen (I used "Last 12 Hours").
- 3. In the Filter On list choose "Characteristic" at the very bottom of the list.
- 4. In the Comparison column choose "is found in".
- 5. Choose the "Last 12 Hours" record filter you just created in the Criteria column.
- 6. Click **OK** to create this filter.

Characterist	ic Fi	lter Editor						×
To create your c true. Filter Name:	shara ast 1	cteristic filter, select the filter fields and cr	teria bel	ow so the filter completes t	he following sentence: S	Show me the characte Assign Part Files	eristics where the f	ollowing criteria is Remove Criteria
AND/OR	(Filter On: Compariso Characteristic is found in	n: ~	Criteria: Last 12 Hours	~)
Show Adv	anc	ed					<u>О</u> К	<u>C</u> ancel

Creating a Data Group

Now that all of the filters you will need have been created, you need to create a **Data Group** using those filters.

1. Use the **Tools > Data Group** menu to show the **Data Group Manager** screen.

Data groups are named re-usable blocks of data that are used throughout both ERS and QC-Mobile to create deliverables such as reports, darboards, and full views. They include a set of characteristics (either from a static list of part files or characteristics (filter) and a set of cycling filters. Administer data groups in the system using the list and buttons below. All data groups that are created are owned by their creator and cannot be effect unless owned.		—		×
MultiplePartFiles	are used throughout both ERS and QC-Mobile to create delivera ractenistics (either from a static list of part files or characteristic fil buttons below. All data groups that are created are owned by the Quick Summary Last 12 Hours Characteristic Filter Filter: Last 12 Hours Char Option: None No Cycling Filters	bles such as re ler) and a set of heir creator and	ports, f cycling fil l cannot be	ters.
No Location or Category				
No Location or Category		re used throughout both ERS and QC-Mobile to create deliver. acteristics (ether from a static list of part files or characteristic fil buttons below. All data groups that are created are owned by th Quick Summary Last 12 Hours Characteristic Filter Filter: Last 12 Hours CharOption: None No Cycling Filters	re used throughout both ERS and OC-Mobile to create deliverables such as re acteristics (either from a static list of part files or characteristic filter) and a set of buttons below. All data groups that are created are owned by their creator and Quick Summary Last 12 Hours Characteristic Filter Filter: Last 12 Hours CharOption: None No Cycling Filters	- -

- 2. Click the blue + button to create a new data group.
- 3. Enter the Group Name at the top of the screen (I used "Last 12 Hours").
- 4. Choose Characteristic Filter at the top of the screen.
- 5. Choose "Last 12 Hours" for the Characteristic Filter option.
- 6. Click **Save** to create this Data Group.

Data Group Editor				o x
Data groups are named re-usable When used in a deliverable they o	blocks of data that are used throughout both ERS and QC-Mo create groupings of data at the characteristic and filter level that	bile to create deliverables. They in are used for statistics and charts.	clude a set of characteristics (either from a static l Choose the characteristics that will be queried alo	st of part files or char ong with record filters
Group Name Last 12 Hour Characteristics			Cycling Filters	
Characteristic Filter	◯ Static Part File List	○ Named List	+-	
Characteristic Filter	Last 12 Maren			
Characteristic Option	None ~			
	☐ Ovenide Part File List			
]
			Save	Cancel

Creating a Report Job

The final step in the process is to create the Report Job.

1. Go to the **Deliverables** tab and click the **+** Add **Deliverable** button at the top of the screen.



2. On the Add a deliverable screen, click the Report Job button at the top.



3. In the **Report Job Wizard** enter the name for this report job. I entered "4.1 Last 12 Hours" in the example below. Click the **Next >>** button.



4. On the **Data Groups** step, choose the "Last 12 Hours" Data Group you created previously from the list on the left and use the > button to move it to the **Selected** list on the right. Click the **Next** >> button.

Report Job Wizard		×
Report Job Wizard	Data Groups Select the Data Groups you want to associate with this report job Available 4.0 Cafe 2 Part Summary:Cafe 2 Abbvie-Soloist-Raw Data:Group AcCMM-Report - Just TP dims Akebono-Plater 1 Akebono-Plater 1 Arconic Arconic Raw Data:Arconic Cafe 2 and 4 Cafe 2 Part Summary:Arconic Cafe 2 Part Summary:Arconic Cafe 2 Part Summary:Arconic Cafe 2 with Machines charfilter DG Copy of Arconic Raw Data:Arcc Copy of Arconic Raw Data:Arcc Copy of Cafe 2 and 4 Report - C DynamicNamedList Group-VetorSoloist Live Data Testing ModelTesting ModelTesting ModelTesting ModelTesting ModelTesting ModelTesting ModelTesting ModelTesting ModelTesting MotelSeries Part Summary:Arco Sample-OperCyc Short Run Testing Frofile Series Part Summary:Arco Sample-OperCyc Short Run Testing <td></td>	
	<pre></pre>	Cancel

5. On the **Filter** step, there is nothing to choose in this case. Click the **Next** >> button.

6. On the **Report** screen is where choices need to be made. You need to determine what type of report you want to run in order to get this screen correct. I have chosen to run a Part Summary report that will show a list of part files that had parts run in the last 12 hours and it will also show how many parts each of those part files had. Click the **Next >>** button.

Namo	Report	
· Data Groups	Report Type Part Summary Report	∕ <u>D</u> esign
Filter	Report Layout Standard - Page break for each group and cycling fit	1
Print To	Template Path C:\Users\Public\Prolink\Enterprise Report Scheduler 4	. <u>B</u> rowse
Schedule	Template File PartSummaryPartCountByFilter.psr	
	Chart Size Automatic ~	
	QC-Mobile Server http://LA:7364	/
	Subgroup Size	
	Report Notes	^
		~
	Tress Jill	
	2↓ □ ✓ Main	^
	2↓ □ ✓ Main Include charts False	^
	Image: 2 Imag	^
	Image: Participation Image: Participation Include charts False Include trace field values False Use saved control limits False	^
	2↓ Image: Constraint of the second seco	^
	21 Image: Constraint of the second secon	^
	21 Image: Constraint of the state of	^
	Image: Participation of the state of t	^
	Image: Second system Image: Second system Image: Second system False Include charts False Include charts False Use saved control limits False V Trend - Drift Drift enabled False Drift threshold 15 V Trend - Duplicate Value Duplicate value count 3	^
	21 Image: Constraint of the second secon	^
	Image: Second system False Include charts False Include trace field values False Use saved control limits False Use fault of the second system False Drift enabled False Drift threshold 15 V Trend - Duplicate Value Duplicate value count 3 Duplicate value precision -1	^
	 21 E Main Include charts False Include trace field values False Use saved control limits False Trend - Drift Drift enabled False Drift threshold 15 Trend - Duplicate Value Duplicate value count Duplicate value enabled False Duplicate value precision -1 	^
	Image: Second	^
	Image: Second State Sta	^

7. On the Print To screen you will need to select how/where this report will be printed. In my case I just want it to be previewed on the screen, but I'm guessing you would want it to be sent to a File and possibly emailed. For testing purposes, choose the Printer > Preview options, then when you have determined everything looks correct change this to be your final setup. Click the Next >> button.

Name	Print To	
···· Data Groups	Printer	Select Printer
Filter	Preview	
···· Report		File Type
···· Schedule	○ File	ADOBE PDF Format \sim
	Output Path:	
	File Name:	
		Custom Name
	Onen in Default Application	
	Attachment Option	QC-Mobile URL
	Attach file only 🗸	http://LA:7364 V
	To:	
	Subject:	
	Body:	
		^
		¥



8. On the Schedule screen you would choose how often you want this report job to run. You will also need to check the Enable This Report Job which is what will actually make it run every 12 hours and the Processor option at the bottom of the screen will only apply if you are using ERS as a Service somewhere. If this setting is "Application" then ERS MUST stay running in order for the report to trigger.

	Schedule	
Name Data Groups Filter Report Print To Schedule	Screedule Choose how often this particular event will run. You can choose from several combinations of hourly, daily, weekly or monthly schedules. Hourly Every Minute(s) Daily Every Hour(s) Weekly Workly Yearly Enable This Report Job Locked (others may not run this report job) Run in troubleshooting mode The Report can be run using this application or the ERS service. Please select the processor for this Report. Processor	

9. Click the **Finish** button on the bottom of the screen and you will see your Report Job has been added to the list of **Deliverables**.

🕂 Add	Deliverat	le 🚺	*	> 🛃	2021				S - Filter:
Enabled	Edit	Сору	Delete	Run Now	Туре	Nam	ne	Interval	Next Run
	Edit	Сору	Delete	Run Now	Report	4.1 A-CMM-Report - TP Report		Every 1 minute	N/A
	Edit	Сору	Delete	Run Now	Report	4.1 Cafe 2 and 4 Report - Continu	uous	Every 1 minute	N/A
	Edit	Сору	Delete	Run Now	Report	4.1 Cafe 2 Part Summary		Every 1 minute	N/A
	Edit	Сору	Delete	Run Now	Report	4.1 Cafe 2 Stat Summary		Every 1 minute	N/A
	Edit	Сору	Delete	Run Now	Report	4.1 Dynamic Location Pease		Every 1 minute	N/A
	Edit	Сору	Delete	Run Now	Report	4.1 Dynamic Named List		Every 1 minute	N/A
	Edit	Сору	Delete	Run Now	Report	4.1 GroupedHist-Cafe4w/Machin	les	Every 1 hour	N/A
	Edit	Сору	Delete	Run Now	Report	4.1 Last 12 Hours		Every 1 minute	N/A
	Edit	Сору	Delete	Run Now	Report	4.1 No Location or Categories		Every 1 minute	N/A

10. In the picture above, nothing is enabled but you should see the box on the left checked for yours and the **Interval** column should show the 12 hours.

11. Click the **Run Now** link that is circled above to test the Report Job that was just created. You will be asked if you want to preview what would happen or really run your report. While testing I would suggest using the **Preview Interactively** option.

📄 Run a Deliverable		×
Choose the way you we	ould like to run the deliverable based on the descriptions below.	
Preview	Preview Interactively Previewing allows you to run the deliverable interactively in print preview mode to see the results. Previews are considered ad hoc and will not be saved to the report history log or be available for viewing in QC-Mobile.	
Run Now	Run Now Run this deliverable immediately without affecting the typical production schedule. This will not show the results of the deliverable interactively, but the results will be saved to the report history log and will be available for viewing in QC-Mobile.	
	Cancel	

- 12. If at any time you want to change a setting in the report job, use the **Edit** link and use the Report Job Wizard again make your changes.
- 13. Here's what the top of this report looks like (only 3 part files had data in the last 12 hours):

		Part File Sum	mary			5/18/2022 6:39:05 PM
Group: Global Filter: Filter: Notes:	Last 12 Hours None All records					
	File Inform	ation		Parts Inf	ormation	
	Part Name	Location	Count	000	00\$	Defects
Cafe 2 Series - 2	001	LaWork	600	4	1	1
Cafe 4 Series - 4	001	LaWork	600	3	0	0
Orfe C Orden C	101	LaWork	600	3	0	0