

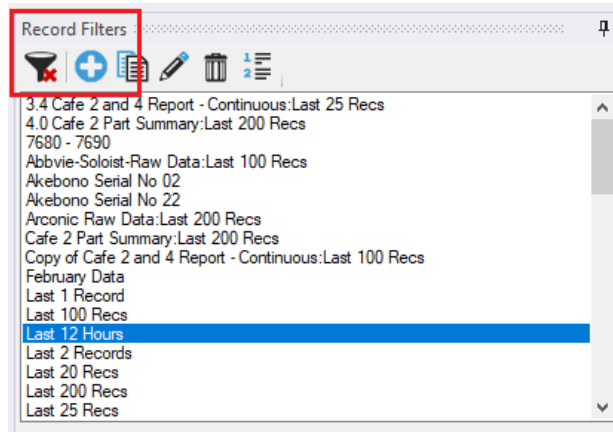
Reporting – 12 Hour Report Job

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.

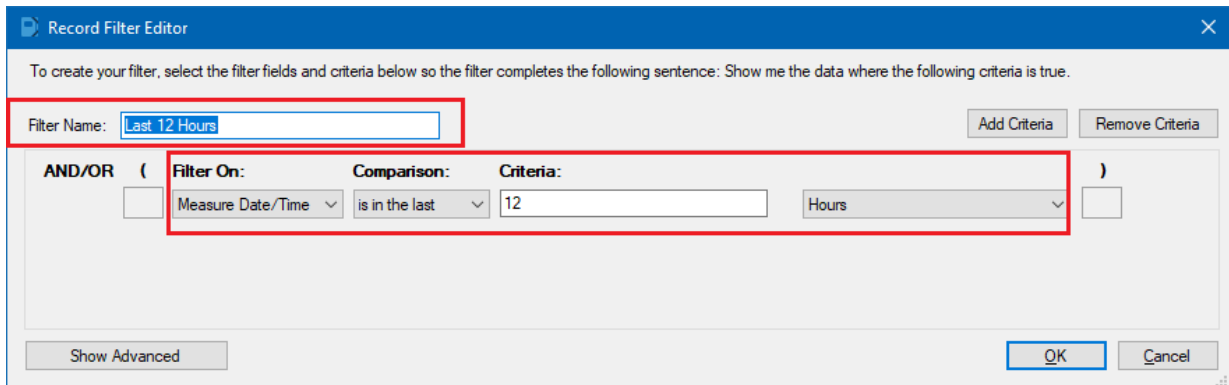
Creating a Record Filter

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.

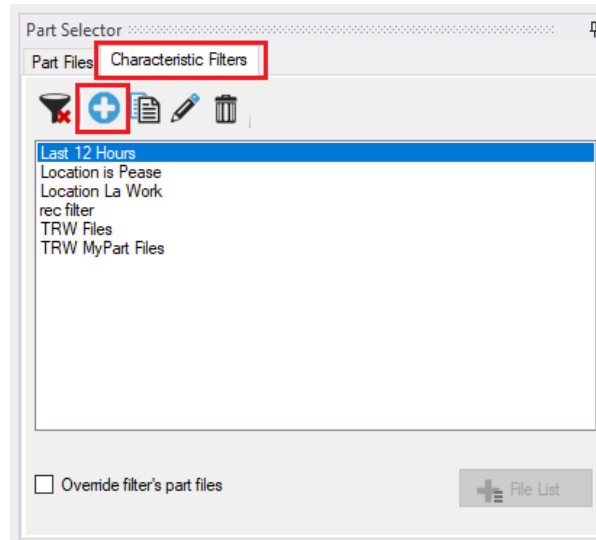


8. You can test this filter by opening a part file that you know contains data collected in the last 12 hours and clicking on that record filter in the panel. The data shown in the grid on the right should all be within the last 12 hours.

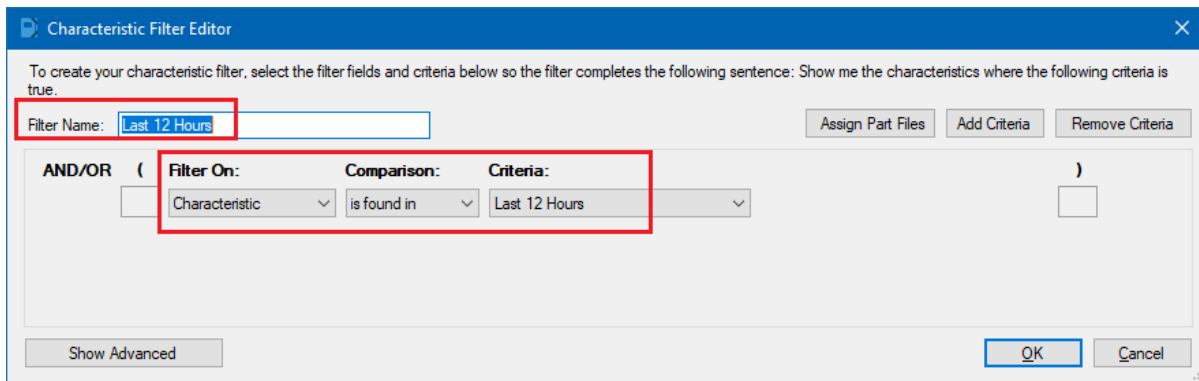
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Creating a Characteristic Filter

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.

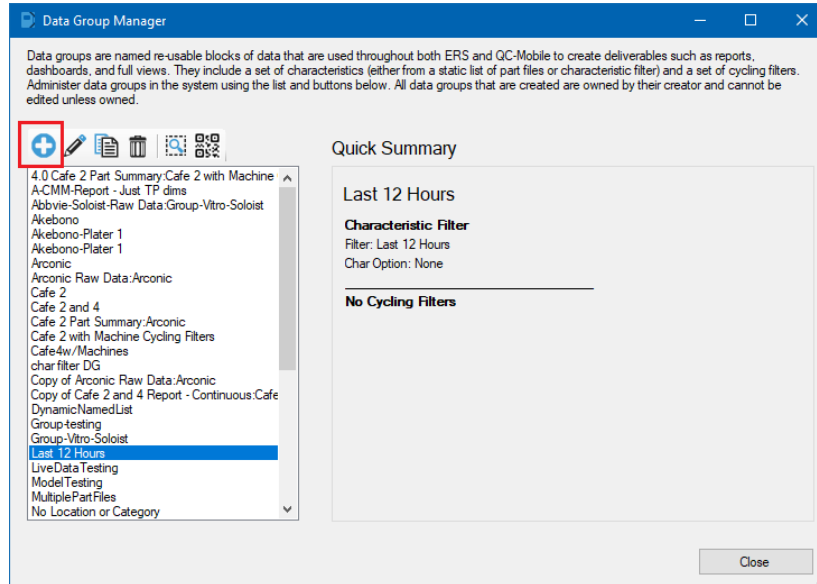


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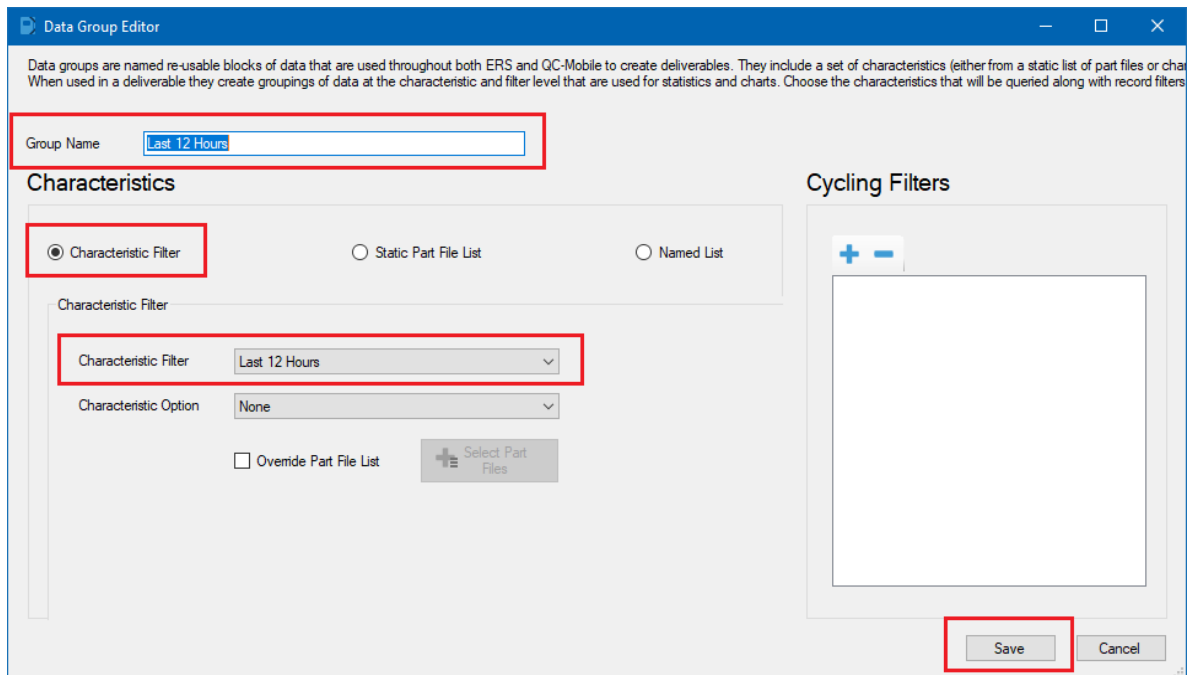
Creating a Data Group

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.



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.

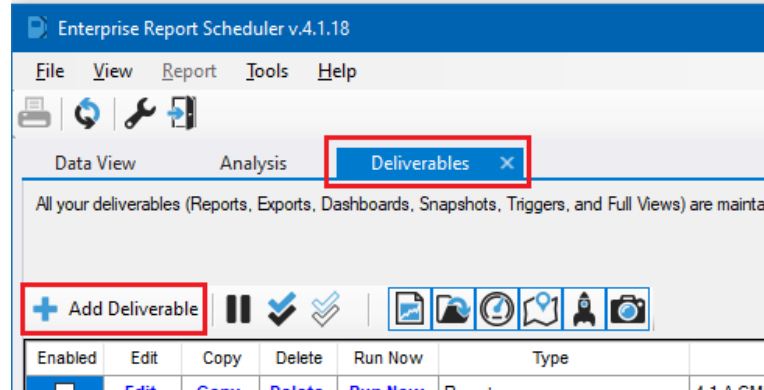


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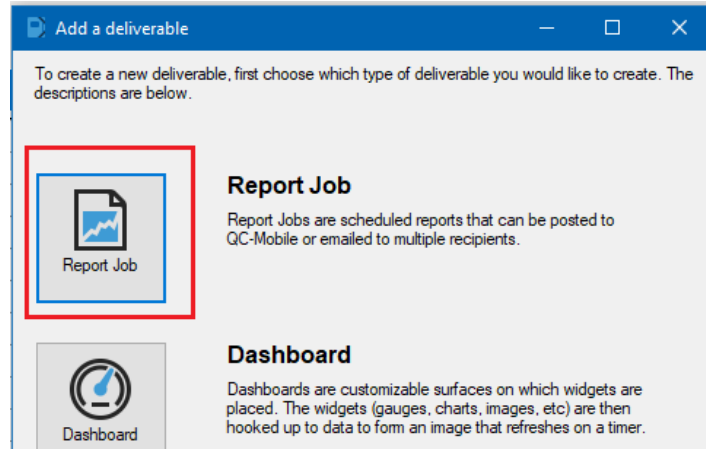
Creating a Report Job

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

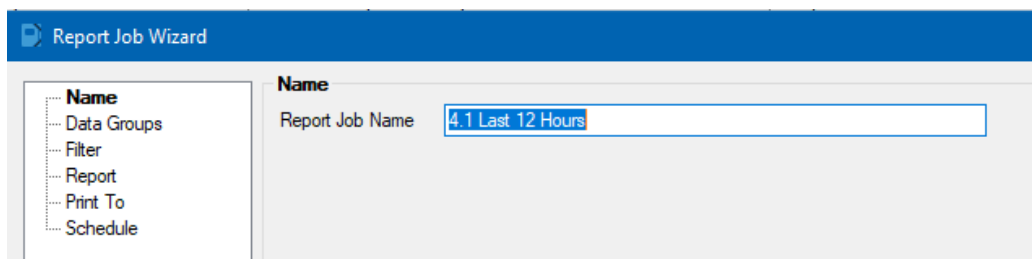
1. Go to the **Deliverables** tab and click the **+ Add Deliverable** button at the top of the screen.



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

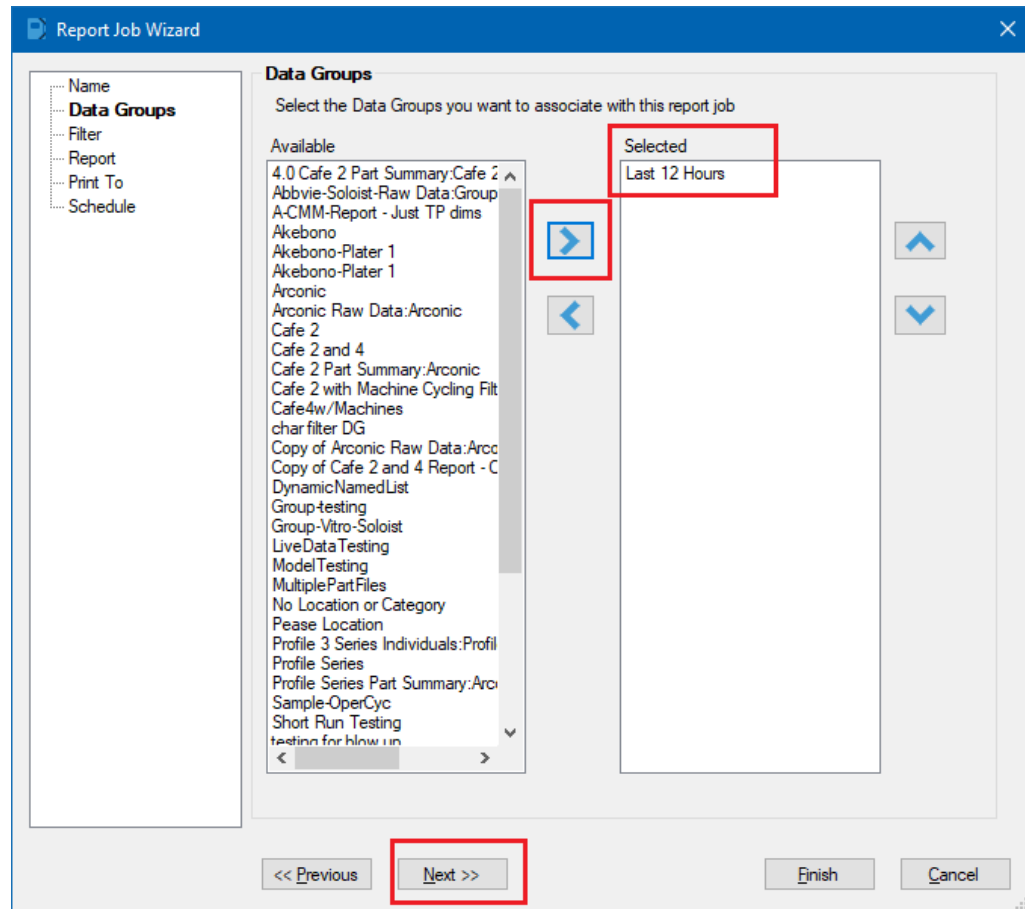


3. In the **Report Job Wizard** enter the name for this report job. I entered "4.1 Last 12 Hours" in the example below. Click the **Next >>** button.



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- 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.



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

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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.

The screenshot shows the 'Report Job Wizard' dialog box with the 'Report' tab selected. The 'Report Type' is set to 'Part Summary Report'. The 'Template File' is 'PartSummaryPartCountByFilter.psr'. The 'Report Notes' field is empty. The 'Main' section is expanded, showing the following settings:

Section	Property	Value
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	3
	Duplicate value enabled	False
	Duplicate value precision	-1
Trend - Low Cp	Low Cp enabled	False
	Low Cp minimum Points	15

The 'Next >>' button is highlighted in blue.

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- 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.

The screenshot shows the 'Report Job Wizard' window with the 'Print To' tab selected. On the left, a tree view shows 'Name', 'Data Groups', 'Filter', 'Report', 'Print To' (selected), and 'Schedule'. The main area is divided into two sections: 'Printer' and 'File'. The 'Printer' section has a radio button selected and a 'Select Printer' button. The 'File' section is highlighted with a red box and contains the following fields: 'File Type' (ADOBE PDF Format), 'Output Path' (with a browse button), 'File Name' (with a 'Custom Name' button), 'Open in Default Application' (checkbox), 'Send Email' (checkbox), 'Attachment Option' (Attach file only), 'QC-Mobile URL' (http://LA:7364), 'To' (with a browse button), 'Subject', and 'Body'. At the bottom, there are buttons for '<< Previous', 'Next >>', 'Finish', and 'Cancel'.

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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.

Report Job Wizard

Schedule

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
☐ Monthly
☐ 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:

<< Previous Next >> Finish Cancel

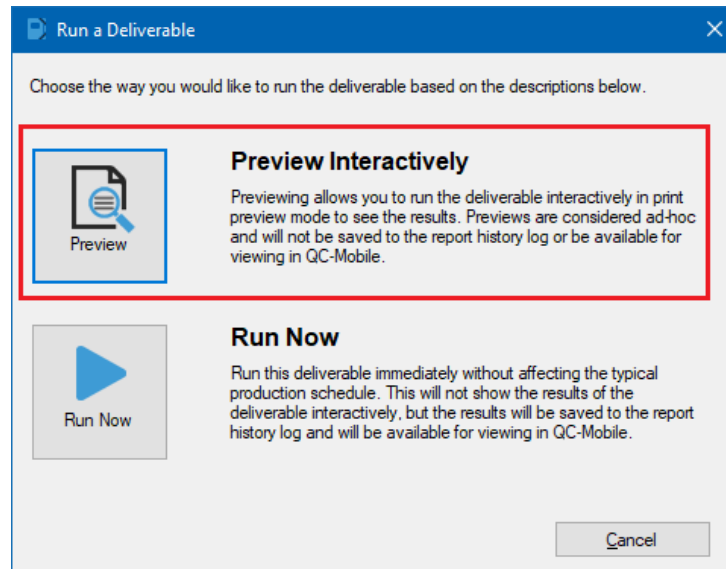
9. Click the **Finish** button on the bottom of the screen and you will see your Report Job has been added to the list of **Deliverables**.

+ Add Deliverable					Filter:			
Enabled	Edit	Copy	Delete	Run Now	Type	Name	Interval	Next Run
<input checked="" type="checkbox"/>	Edit	Copy	Delete	Run Now	Report	4.1 A-CMM-Report - TP Report	Every 1 minute	N/A
<input type="checkbox"/>	Edit	Copy	Delete	Run Now	Report	4.1 Cafe 2 and 4 Report - Continuous	Every 1 minute	N/A
<input type="checkbox"/>	Edit	Copy	Delete	Run Now	Report	4.1 Cafe 2 Part Summary	Every 1 minute	N/A
<input type="checkbox"/>	Edit	Copy	Delete	Run Now	Report	4.1 Cafe 2 Stat Summary	Every 1 minute	N/A
<input type="checkbox"/>	Edit	Copy	Delete	Run Now	Report	4.1 Dynamic Location Pease	Every 1 minute	N/A
<input type="checkbox"/>	Edit	Copy	Delete	Run Now	Report	4.1 Dynamic Named List	Every 1 minute	N/A
<input type="checkbox"/>	Edit	Copy	Delete	Run Now	Report	4.1 GroupedHist-Cafe4w/Machines	Every 1 hour	N/A
<input type="checkbox"/>	Edit	Copy	Delete	Run Now	Report	4.1 Last 12 Hours	Every 1 minute	N/A
<input type="checkbox"/>	Edit	Copy	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.

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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.



The dialog box titled "Run a Deliverable" contains two main options. The "Preview Interactively" option is highlighted with a red border. It includes a "Preview" icon (a document with a magnifying glass) and a description: "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." The "Run Now" option includes a "Run Now" icon (a play button) and a description: "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." A "Cancel" button is located at the bottom right.

Option	Icon	Description
Preview Interactively	Preview	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.

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 Summary						5/18/2022 6:39:05 PM
Group:	Last 12 Hours					
Global Filter:	None					
Filter:	All records					
Notes:						
File Information			Parts Information			
Part Name	Location	Count	OOC	OOS	Defects	
Cafe 2 Series - 2001	La Work	600	4	1	1	
Cafe 4 Series - 4001	La Work	600	3	0	0	
Cafe 6 Series - 6001	La Work	600	3	0	0	