

Navigation:
View Definition Wizard

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About This Guide

This guide is designed as a training tool for **ARCHIBUS V.19.1**. The guide may or may not be compatible with earlier or later versions of ARCHIBUS.

The following represents the estimated time a user will spend reading the document and completing the included exercises.

Training Topics:	Minutes:
Overview	:30
Exercise 1521: Create a 2-panel Report	:05
Exercise 1522: Create a 3-panel Edit Form	:05
Exercise 1523: Create a 1-panel Crosstab	:05
Exercise 1524: Create a 1-panel Pie Chart	:05
Exercise 1525: Create a Banded Paginated Report	:05
Exercise 1526: Create a Paginated Report with Drawing Restriction	:05
Exercise 1527: Create a Paginated Report with Thematic Highlighting	:05
Estimated Time to Complete	<hr/> 1:05

Overview: Creating and Changing Views

You might find that a view shipped with ARCHIBUS Web Central does not quite meet your needs and you'd like to change the fields that display, set a restriction, or make other changes. Similarly, you might find that you need to create your own views to meet the particular needs of your site.

If you have the proper security permissions, you can edit and create views using the View Definition Wizard. The View Definition Wizard walks you through the steps of creating the following types of view and edit forms:

Interactive Reports

- Report
- Drill-down to a report
- Two-level drill-down to a report

Paginated Reports

- A paginated report with one data band
- A paginated report with one parent band and one child band
- A paginated report with two parent bands and one child band
- A paginated report with highlighted drawings
- A paginated report with thematically highlighted drawings

View Analysis Views

- Summary report
- Drill-down to a summary report
- Summary chart
- Drill-down to a summary chart

Edit Forms

- Select-edit form
- Console filtering a select list and its edit form
- Drill-down to a select list and its edit form
- Two-level drill down to a select list with a pop-up edit form

If you wish a more sophisticated view than available through the options of the View Definition Wizard, you can use the Wizard to start your view and then use its Enable Advanced Editing option to directly edit the code. The View Definition Wizard both creates and alters views. With the wizard you can:

- create new XML views (.axvw files) in the 2.0 format
- alter 2.0 format views
- re-create 1.0 views as to 2.0 views
- re-create ARCHIBUS BasicScript views (.avw files) as 2.0 format views

In This Document

The goal of this document is to give users the skills needed to create the above report types and to get the following results:

- Reports for detailed data
- Charts and graphs for summary data
- Edit forms for managing and editing data
- Paginated reports for printing detailed documents
- The ability to present data in multiple formats

Web-based Views:

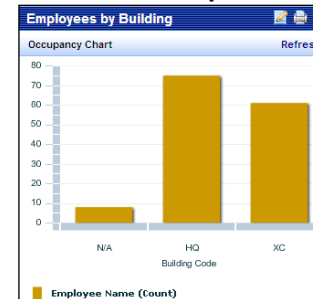
Buildings			Employees					
Building Code	Building Name	Total Emp Dept Area (fld not used)	Employee Name	Floor Code	Room Code	Division Code	Department Code	Allocated Room Area
XC	Exchange Center	0.00	ABROL, SHARON	15	124	FACILITIES	DESIGN	74.86
HQ	Headquarters	2,438	ACEVEDO, BRETT	15	127	FACILITIES	DESIGN	74.86
I202	Iron Works Building	0.00	ACHARYA, JUANA	15	125	FACILITIES	DESIGN	74.86
I204	Castings Building	0.00	AJAYI, DAVID	15	101	FACILITIES	CONSTRUCTION	97.48
JACQUES	Jacques Place	0.00	BUGLIONE, JENNIFER	15	101	FACILITIES	CONSTRUCTION	97.48
JFK A	JFK Building A	0.00	BUKER, KRISTINE	15	102	FACILITIES	CONSTRUCTION	74.92
JFK B	JFK Building B	0.00	BULL, ANTHONY	15	102	FACILITIES	CONSTRUCTION	74.92
JFK C	JFK Building C	0.00	BUNNELL, MELANIE	15	104	FACILITIES	CONSTRUCTION	166.41
MARCEL	Marcel Place	0.00	BUQUICCHIO, RANDOLPH	15	105	FACILITIES	CONSTRUCTION	239.92
			BURDI, MONICA	15	106	FACILITIES	CONSTRUCTION	61.88
			ABERNATHY, ALISON	17	105	ELECTRONIC SYS.	ENGINEERING	37.43
			ADAMS, CHRIS	17	103	ELECTRONIC SYS.	ENGINEERING	37.43
			AFM	17	126	ELECTRONIC SYS.	ENGINEERING	231.33

Adobe PDFs

Employees
Page: 1
Sep 1, 2009

Employee Name	Floor Code	Room Code	Division Code	Department Code	Allocated Room Area
ABROL, SHARON	15	124	FACILITIES	DESIGN	74.86
ACEVEDO, BRETT	15	127	FACILITIES	DESIGN	74.86
ACHARYA, JUANA	15	125	FACILITIES	DESIGN	74.86
AJAYI, DAVID	15	101	FACILITIES	CONSTRUCTION	97.48
BUGLIONE, JENNIFER	15	101	FACILITIES	CONSTRUCTION	97.48
BUKER, KRISTINE	15	102	FACILITIES	CONSTRUCTION	74.92
BULL, ANTHONY	15	102	FACILITIES	CONSTRUCTION	74.92
BUNNELL, MELANIE	15	104	FACILITIES	CONSTRUCTION	166.41
BUQUICCHIO, RANDOLPH	15	105	FACILITIES	CONSTRUCTION	239.92
BURDI, MONICA	15	106	FACILITIES	CONSTRUCTION	61.88
ABERNATHY, ALISON	17	105	ELECTRONIC SYS.	ENGINEERING	37.43

Charts and Graphs



Microsoft Word Documents

Occupancy By Floor
Page 1 of 5
September 1, 2009

Building Code	Floor Code	Room Code	Employee Headcount	Occupiable?
HQ	15	104	1	Yes
HQ	15	105	1	Yes
HQ	15	106	1	Yes
HQ	15	107	1	Yes
HQ	15	108	1	Yes
HQ	15	109	1	Yes
HQ	15	110	1	Yes

Microsoft Excel Spreadsheets

demo1520_employees_by_building17_05_319y07laxw47q1.xls [Read-Only]

Employee Name	Floor Code	Room Code	Division Code	Department Code	Allocated
ABROL, SHARON	15	124	FACILITIES	DESIGN	74.86
ACEVEDO, BRETT	15	127	FACILITIES	DESIGN	74.86
ACHARYA, JUANA	15	125	FACILITIES	DESIGN	74.86
AJAYI, DAVID	15	101	FACILITIES	CONSTRUCTION	97.48
BUGLIONE, JENNIFER	15	101	FACILITIES	CONSTRUCTION	97.48
BUKER, KRISTINE	15	102	FACILITIES	CONSTRUCTION	74.92
BULL, ANTHONY	15	102	FACILITIES	CONSTRUCTION	74.92
BUNNELL, MELANIE	15	104	FACILITIES	CONSTRUCTION	166.41
BUQUICCHIO, RANDOLPH	15	105	FACILITIES	CONSTRUCTION	239.92
BURDI, MONICA	15	106	FACILITIES	CONSTRUCTION	61.88

Basic Skills: View Definition Wizard

As with any flexible report-writing software, it is useful for a user to have a basic understanding of how data is stored and the steps involved in manipulating the data. The skills below will help you better understand how to create and modify views using the ARCHIBUS View Definition Wizard.

Skill 1: Answering the Important Questions in Advance

ARCHIBUS stores data in database tables made up of grid-like columns and rows similar to a spreadsheet like the one below. The data in these tables can be linked to other tables, summed up, counted, sorted, and restricted, just to name a few of the ways in which the data can be manipulated. Creating or altering a view consists of deciding how and what data from the tables will be displayed on a physical page. This process is true whether you are using ARCHIBUS or some other report-writing application. Before working on any view, a user should answer the following questions:

	A	B	C	D	E
1					
2					
3					
4					
5					

1. Will this view be displaying data from or entering data into the database?
2. If the view is displaying data, should the view display the data in the form of a report, chart, graph, drawing, etc.?
3. What data should the view display? On screen? In a print-out?
4. Will the displayed data be coming from multiple tables and if so, are the tables related?
5. How should the view be totaled, summarized, sorted, restricted, etc?

Answering these questions will provide you with an overall idea of what kind of view you should create and will help you understand the steps used in the View Definition Wizard.

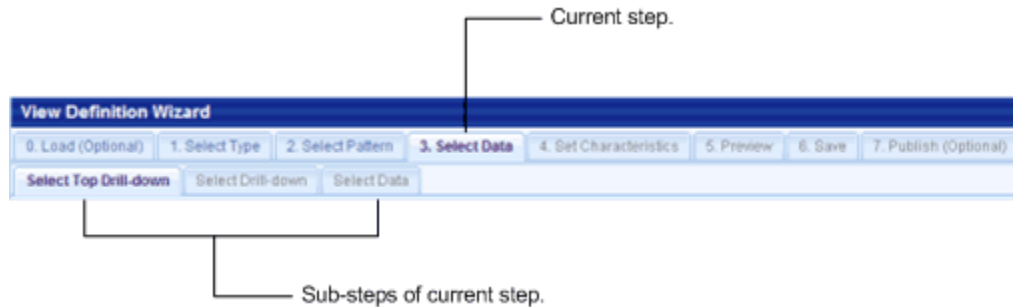
Skill 2: Understanding the Functionality of the View Definition Wizard

Having answered the important questions about what kind of view you will create, it is important to understand the types of views that the View Definition Wizard will create without any additional programming effort. The View Definition Wizard provides 16 templates for a variety of reports ranging from paginated reports to mixed line and bar charts to edit forms. These templates give a wide-range of functionality to an end-user, but by default are limited. In addition to the templates that come with the View Definition Wizard, the wizard allows a user to manually edit the code created for the report. This allows a user an unlimited ability to modify the report with custom scripting and to take advantage of their own knowledge of SQL, XML, CSS, JavaScript, etc. Without this ability to code, it is important to understand a few points about the View Definition Wizard templates:

- While they allow for statistics on multiple sets of data (total room area, total chargeable area, total allocated area, etc.), they do not allow for multiple groupings of data (by floor and department, by problem type and year).
- While they allow for grouping by a single field, they do not allow for grouping by a field that is part of a multi-part primary key. For example, a chart grouping by department will put all "Marketing" information into the same column even though there are three marketing departments, each belonging to a different division. This is because the wizard does not recognize that each unique department is characterized by its link to a division (Note: the FL and DP tables have two-part keys).

Skill 3: Learning the View Definition Wizard Process

To create or alter a view, you work through the major steps outlined across the top of the View Definition Wizard. Some steps include substeps, which are outlined in a second horizontal row. The shaded tab shows your current location. For example, the following image shows the sub-steps of Step 3: Select Data:



Once you move from a step, you can return to a previous step to change the view's properties. For example, suppose you are defining a drill-down view and have added the characteristics for the main table (Step 4). You then decide you want to change your drill-down table. You can return to Step 3: Select Data and choose a new drill-down table; the characteristics you specified for the main table will remain intact.

If you have defined parts of your view, the View Definition Wizard limits you in changing the view pattern or type. For example, if you start defining a view that has one table and you then return to Steps 1 and 2 to change the type and pattern, the Wizard limits you to choosing patterns that contain only one table. If you want to change to a two-table view, you should simply start a new view. To start a new view, choose the "Start Over" button on any step.

The following is a list of steps in the View Definition Wizard and their functions:

0. **Load:** Load allows a user to choose an existing view to alter or convert. The data for the next steps will be automatically determined by the loaded view.
1. **Select Type:** Select Type asks a user to determine whether the new view will be for displaying information in a report, displaying information in a chart or graph (summary report), or for entering data in an edit form.
2. **Select Pattern:** Once the type of report has been decided upon, Select Pattern asks a user to choose a standard pattern from a list. The user must choose one of these patterns. If the pattern doesn't exactly fit what the user is looking for, the user should choose the pattern that best resembles the end result and then modify the view in step 5.
3. **Select Data:** After choosing a pattern, the user must decide what data will be displayed in each piece of the pattern and pick the appropriate data tables for each piece.
4. **Set Characteristics:** Once the user has selected tables from which to retrieve the data, Set Characteristics allows the user to select visible data fields, sort the view, restrict the view to certain record types, create labels, define charts and graphs, etc.
5. **Preview:** Step 4 completes the view. The Preview step allows the user to look at the finished view before saving it as a file. During the preview step, the user has the choice of directly editing the view code in case there is a change that could not be made to the view up until this point.
6. **Save:** Once the view is finished and verified, it must be saved as a file. During the Save step, the user assigns the view a name, a location to store the file, and an ARCHIBUS activity with which the file will be associated. The application then saves the file with an .axvw extension.
7. **Publish:** The Publish step allows a user to choose a location on the Process Navigator to place a task for displaying the view. The location will default to the activity defined in the previous step.

Skill 4: Choosing View Types According to Desired Results


When a report has been defined and the process of stepping through the wizard understood, it is helpful to choose view patterns that create views appropriate to the finished product. Below are examples of how to choose the appropriate pattern for a report listing employees sorted by building. You will see that there are many different options for the same data depending on how the final report should look.

1. **Employee List Sorted by Building:** The final report will be a list of employees from the “EM” table. All the fields used in the report come from the “EM” table and the data is sorted by the “building” field, so a simple one panel report pattern is appropriate:

0. Load (Optional) | 1. Select Type | **2. Select Pattern**

Select pattern appropriate for this type of view [Start Over](#)

A report



Employees by Building

Employees - 1 Panel Refresh PDF

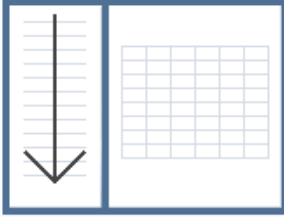
Employee Name	Building Code
ALLBURG	
ABROL,SHARON	HQ
ACEVEDO,BRETT	HQ
ACHARYA,JUANA	HQ
AJAYI,DAVID	HQ
ABERNATHY, ALISON	HQ
ADAMS, CHRIS	HQ
AFM	HQ
APPLEBY, STEVE	HQ
ABBOT, PAUL	XC
ANDERSON, CAROLINE	XC

2. **Employee List Sorted By Building (2-table Owner-Assigned):** The final report will be a list of employees from the “EM” table sorted by their corresponding building records in the “BL” table. Because this report uses an owner table (BL) and an assigned table (EM) to restrict and sort records, the appropriate pattern for the final view is a two-panel report. The first panel will hold data from the buildings table. The second panel will hold the list of employees for the selected building:

0. Load (Optional) | 1. Select Type | **2. Select Pattern**

Select pattern appropriate for this type of view [Start Over](#)

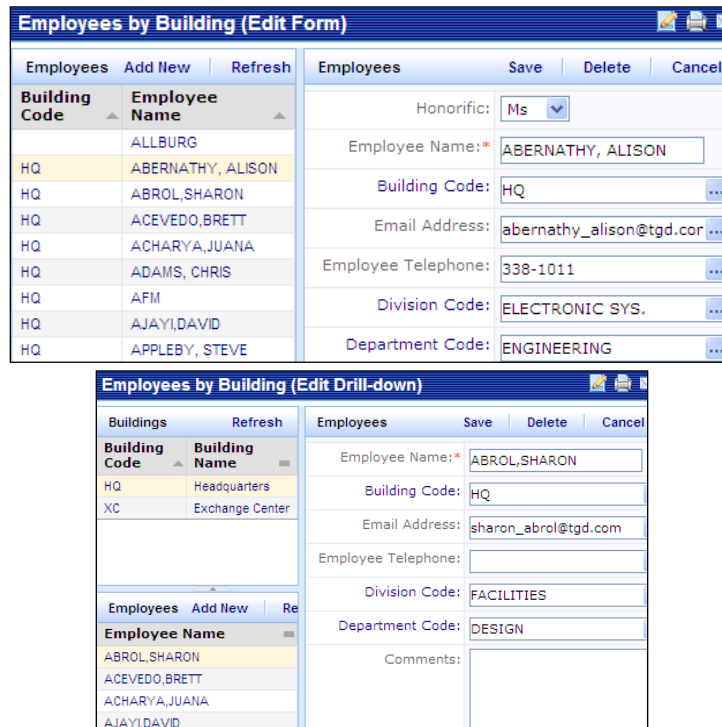
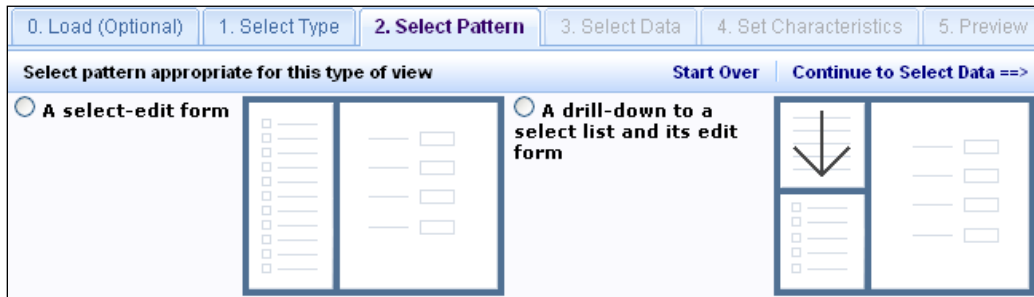
A drill-down to a report



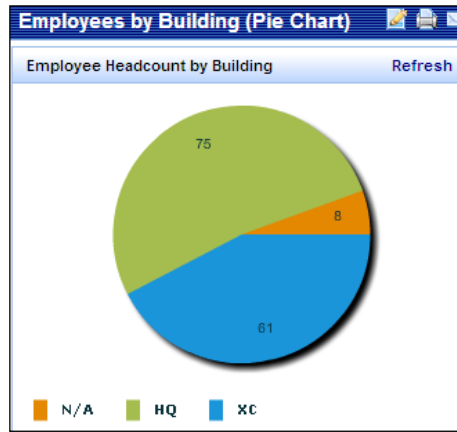
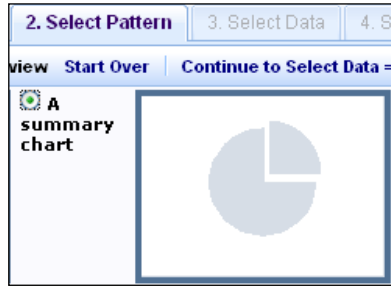
Employees by Building (Drill-down)

Buildings		Refresh	Employees		Refresh	PDF	XLS
Building Code	Building Name		Employee Name				
HQ	Headquarters		ABROL,SHARON				
			ACEVEDO,BRETT				
			ACHARYA,JUANA				
			AJAYI,DAVID				
			ABERNATHY, ALISON				
			ADAMS, CHRIS				
			AFM				
			APPLEBY, STEVE				

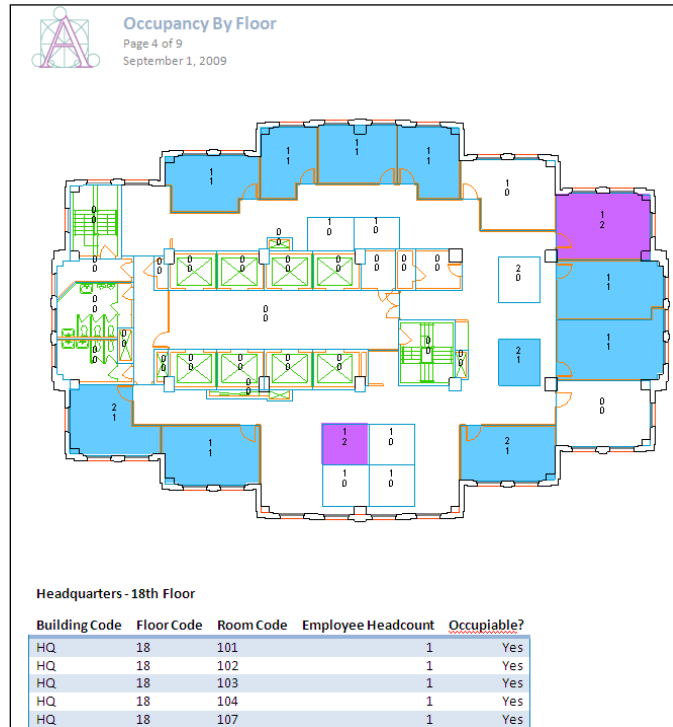
- Employee List Sorted By Building (Edit Form):** The final report will be a list of employees from the “EM” table sorted by building which allows employee records to be added, deleted, or modified. There are several valid options for such a report and the choice depends on an end-user’s preference:



- Employee List Sorted By Building (Summary):** The summary report is a list of employees from the “EM” table sorted by their corresponding building records in the “BL” table. The report is meant to give a summary of the employees in each building as opposed to detailed information about every individual. For this reason, a simple pie chart is the best view pattern:



- Occupancy By Building and Floor (Highlight Drawing):** The final report shows occupancy based on employee headcounts on each floor from the “RM” table. The report is meant to show the number of employees in each room of a building. For this reason, a paginated report with a restriction highlight is the best option for this report:



As you can see, choosing a report pattern for a particular set of data depends entirely on the final presentation. What is important, is to become familiar with where the data is located. For example, in the choices above, it is key that a user is aware of the fact that the building information for each employee resides in the “EM” or employee table, and therefore a report showing both employees and buildings can use just the “EM” table or both “EM” and “BL” to get at data. The View Definition Wizard can be learned in a very short period of time and it is a powerful tool, but its usefulness is magnified exponentially as the user becomes familiar with the data tables and their relationships. When familiarity with the data tables is maximized, thousands of reports and their variations can be written quickly using just the 16 standard report types available in the View Definition Wizard.

Skill 5: Setting View Characteristics

In Step 4 of the View Definition Wizard process, you set many properties of the view for each of the data tables in your panels. For each of the tables, you choose the corresponding buttons to set or change the fields that the view displays, the order in which it displays records, records it should omit, and so forth.

The screenshot displays the '4. Set Characteristics' step of the View Definition Wizard. At the top, a navigation bar includes steps 0 through 7, with '4. Set Characteristics' highlighted. Below this is a sub-navigation bar with buttons for 'View Summary', 'Select Fields', 'Select Sort Order', 'Add Standard', 'Set Restriction', and 'Set Options'. The main area is titled 'Summary of View Characteristics' and contains the following elements:

- A header bar with 'Start Over' and 'Continue to Preview ==>' buttons.
- Instructional text: 'Use the buttons below to change the characteristics of this view.'
- A 'View title:' label followed by a text input field containing 'Title of View'.
- Two data table rows:
 - Table 'rmstd': Labeled 'Required' in red. Buttons are 'Select Fields', 'Set Sort Order', 'Add Standard', 'Set Restriction', and 'Set Options'.
 - Table 'rm': Labeled 'Optional' in green. Buttons are 'Select Fields', 'Set Sort Order', 'Add Standard', 'Set Restriction', and 'Set Options'.

After you set each property, choose the Save and Return to Summary button (which displays the above screen) so that you can set the next property. Once you set a property for a table, you can change your selections by reselecting the corresponding button. Keep in mind the following as you set the properties of each table:

View Title

You can change the View Title -- the text that displays in the top center of the completed view. For an illustration of a view title, see the image under "Options" later in this topic.

Fields

For each table in the view, you can specify the fields from each table that the view should display and the order in which it should display these fields. For the desired table, choose the Select Fields button to access a list of fields for this table.

- To add a field to the view, locate it in the bottom panel of the view and click its box; the system displays it to the upper panel. Use the Up and Down buttons to place the field in the desired order.
- To remove a field from the view, locate it in the upper panel and choose its Remove button.
- To change the order in which a view displays fields, work with the Up and Down buttons.
- To clear the entire set of visible fields so that you can start over, choose Reset.
- Each table in the view must present at least one field.
- When you are satisfied with the table's set of fields and the order in which they will display, choose Save and Return to Summary.

Sort Order/Grouping

Sort orders dictate by which fields the view will present the data. For example, you can sort Building records by total area, listing them in order from smallest square footage to largest. For the desired table, choose the Set Sort Order button to examine the current sort order. You can set the primary sort field, and optionally, set secondary sort fields.

- Click the "Set" button next to the field by which you want the view to present data. For example, if you want Building records to be listed according to Rentable Area, click on the Rentable Area's "Set" button.
- To sort records whose value is the same for the sort order field, you can include secondary sort fields. For example, if there are several buildings with the same Rentable Area, you can specify Building Code as the second sort field so that buildings with the same rentable area value will be listed alphabetically by their Building Code value.
- You can set as many secondary sort fields as necessary. The value in the Sort Order field shows the order by which the view uses the secondary sort fields. You can choose only fields that are displayed by the view.
- To clear the sort order so that you can start again, choose the "Clear Selected Sort Order" button.
- When you are satisfied with the table's sort order, choose Save and Return to Summary.

Note: From the View Definition Wizard and Alter View Wizard, you can sort only on fields that are visible in the view. If you wish to sort on a non-visible field, you must directly edit the .axvw file.

Standard

In addition to the fields of the specified tables, you may wish to display fields from tables that validate on fields in these tables. For example, suppose a view presenting the Employees table lists the Department Code field (a validated field of the Employees table). When examining an employee's record, it might be helpful to also see the Department Head for the employee's department.

Since the Department Head field is stored in the Departments table, you choose this field by selecting the Add Standard button. The View Definition Wizard displays all fields from all tables that validate on fields in the Employees table. From here, you can choose the Department Head field of the Departments table. Once you specify standard fields to display, you can return to the Select Fields tab to set the order of the standard fields.

This view presents the Employees table. The Department Head field is a standard, stored in the Departments table.

Employee Name	Email Address	Division Code	Department Code	Department Head
ABBOT, PAUL	patbott@dc	ACCESSORIES	MARKETING	Myron Fields
ABERNATHY, ALISON	abemathy_alison@tgd.com	ELECTRONIC SYS.	ENGINEERING	
ABROL, SHARON	sharon_abrol@tgd.com	FACILITIES	DESIGN	
ACEVEDO, BRETT	brett_acevedo@tgd.com	FACILITIES	DESIGN	
ACHARYA, JUANA	juana_acharya@tgd.com	FACILITIES	DESIGN	
ADAMS, CHRIS	adams_chris@tgd.com	ELECTRONIC SYS.	ENGINEERING	
AFM	afm@tgd.com	ELECTRONIC SYS.	ENGINEERING	
AJAYI, DAVID	david_ajayi@tgd.com	FACILITIES	CONSTRUCTION	
ALLBURG	allburg@tgd.com	ELECTRONIC SYS.	ENGINEERING	
ANDERSON, CAROLINE	canderson@dc			
APPLEBY, STEVE	appleby_steve@tgd.com	EXECUTIVE	MANAGEMENT	
BABIC, PAUL	babic_paul@tgd.com	EXECUTIVE	MANAGEMENT	
BACHMAN, ELLEN	ebechman@dc			
BAKER, GEORGE	gbaker@dc			
BARNES, GREG	gbarnes@dc			
BARNSWORTH, BRUCE	barnsworth_bruce@tgd.com	ELECTRONIC SYS.	ENGINEERING	
BARTLETT, JOAN	bartlett_joan@tgd.com	EXECUTIVE	MANAGEMENT	
BEAULIEU, ANDRE	ebeulieu@dc	ACCESSORIES	MARKETING	Myron Fields
BECKWITH, DAVID	beckwith_david@tgd.com	EXECUTIVE	MANAGEMENT	
BERG, CAROLE	cberg@dc	ACCESSORIES	DISTRIBUTION	Artemis Wide
BERRY, JOAN	berryj@dc	ACCESSORIES	DISTRIBUTION	Artemis Wide
BLUM, JOEL	jblum@dc	ACCESSORIES	DISTRIBUTION	Artemis Wide
DOONE, ROBERT	rboone@dc			
BRADY, TONY	brady_tony@tgd.com	HUMAN RESOURCES	NEW ENGLAND	
BROWNE, SALLY	sbrowne@dc	ACCESSORIES	DISTRIBUTION	Artemis Wide
BROWNIE, ANDREW	abrownie@dc	ACCESSORIES	DISTRIBUTION	Artemis Wide

Restriction

Many views filter (or restrict) a table's records and present only records that meet specified criteria. For example, you may wish to show only employees who are assigned to a department; that is to say, Employee records that have a value for Department Code.

For each table in your view, you can restrict the records that the view displays according to one or multiple conditions that you specify. For example, the following restriction for the Employees table specifies that the view should show all Employee records that do not have a value for the Department Code field.

Add New Filter Clause			
Conjunction	Field	Operator	Value
AND	em.dp_id	NULL	

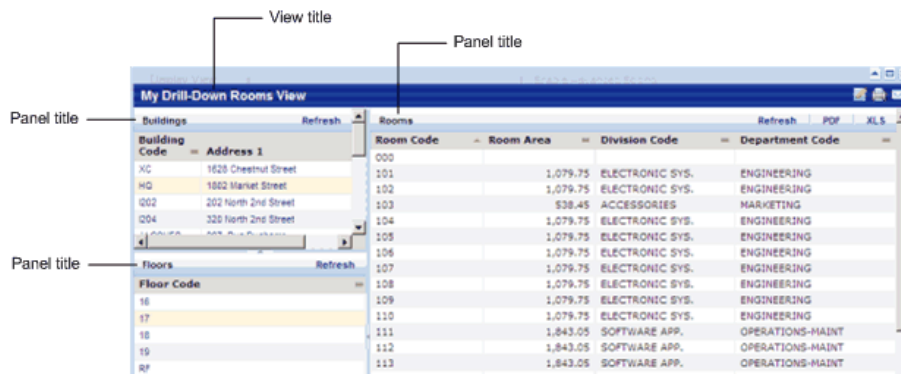
For the desired table in your view, choose the Set Restriction button to examine the current restriction, if any. The view presents a form for setting the restriction:

- To remove a restriction from the view, choose the Remove button in the Review Existing Filter Clauses panel (the upper panel).
- To specify a new restriction, work with the Add New Filter clause panel. When you finish specifying the restriction, the system will display it in the upper panel.
- When choosing the field to restrict by, you can choose only fields that are displayed by the view. If necessary, you can change the table's field visibility by exiting from this form and returning to the Select Fields form.
- When choosing the value, you can select from the existing set of values in the database by choosing the ellipsis button, or you can type in your own value.
- Choose the operator, such as equals, greater than, lesser than, and so forth.
- For the LIKE and NOT LIKE operators, use "_" to represent any single character and use "%" to substitute any string of characters, including an empty string. For example, if you select Building Code for the field and LIKE as the operator, enter a value of "H_" to set the view to restrict to all buildings whose codes begin with H, such as HQ.
- To clear the restriction so that you can start again, choose the Reset button.
- When you are satisfied with the table's restriction, choose Save and Return to Summary.

Options

The options that you can set for your view depend upon the type of view you are creating.

- Calculations: If you are working with a view-analysis view, you set your calculations with the Options tab.
- Panel Title



Skill 6: Setting Characteristics for View Analysis-Style Views

Creating a View Analysis view requires that a user sets a grouping field as well as the options for summarizing data. For example, to create a view showing the total number of employees by building, you must make the employee code and the building code visible in the view and you must choose building code as the grouping field.

0. Load (Optional) | 1. Select Type | 2. Select Pattern | 3. Select Data | **4. Set Characteristics** | 5. Preview | 6. Save | 7. Publish

View Summary | Select Fields | Select Sort Order | Add Standard | Set Restriction | Set Options

Summary of View Characteristics Start Over | Continue to Preview ==>

Use the buttons below to change the characteristics of this view.

View title:

em	Required	Required	Optional	Optional	Required
<input type="text"/>	Select Fields	<input type="button" value="Set Sort Order"/>	Add Standard	Set Restriction	<input type="button" value="Set Options"/>

- Click the Set Sort Order button to set the fields by which you want the report to group data.
 - These fields must be visible in the view. If these fields are not visible, you can return to the Select Fields tab to make these fields visible.
 - You cannot set the primary key field as the grouping field.
 - For any fields that are date fields, you must choose how you want the view to group the data: by Year, Year and Week, Year and Quarter, and so on. These options correspond to the available date-grouping formulas. Note that if a summary view is already grouped by a date field, you do not set this option.

0. Load (Optional) | 1. Select Type | 2. Select Pattern | 3. Select Data | **4. Set Characteristics** | 5. Preview | 6. Save | 7. Publish

View Summary | Select Fields | **Select Sort Order** | Add Standard | Set Restriction | Set Options

Set Grouping Clear Selected Sort Order | Save and Return to Summary

Select the field by which to group the data for this summary report/chart.
 Summary or view analysis views should choose a sort field as the category by which to summarize the data in the view.
 Summary or view analysis views cannot use the natural order or primary key as the sort order (as this choice would not

Field Name	Heading	Primary Key	Data Type	A/FM Type	Table	Descending?	Sort Order
em_id	Employee Name	1	Char	None	em	<input type="checkbox"/>	
bl_id	Building Code	0	Char	None	em	<input checked="" type="checkbox"/>	1st

- Click the Set Options button to set the calculations that the view will run. For each numeric field in the view, you can choose to include a sum, count, and average statistic, as well as sum percentage, count percentage, and average percentage.

Field	Name	Count	Sum	Avg	Count Percentage	Sum Percentage	Average Percentage
Employee Name	em_id	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>		
Building Code	bl_id	<input type="checkbox"/>			<input type="checkbox"/>		

Enable drilldown?

3. Set Chart Options

Chart Type: Column Chart

Show Axis Labels?: Yes

Width: 100 %

Height: 100 %

Show Legend?: Yes

Show Data Tips?: Yes

Background Color (in Hex): 0xFFFFFFFF

Fill Type: Solid

Fill Color (in Hex):

Percent Gradient Change (0.0 - 1.0): 1

Percent Transparency (0.0 - 1.0): 1

Label Position (Data Axis): None

Label Rotation (Data Axis): 0

Auto-Calculate Tick Size Interval?: Yes

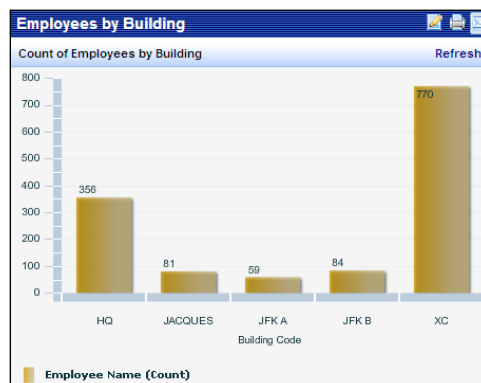
Tick Size Interval:

- Chart Type** -- Indicates the type of chart, such as a bar chart, pie chart, stacked bar chart, and so forth.
- Show Axis Labels?** -- Select Yes or No depending on if you want the system to label the axes of the chart. Labeling the axes typically results in a clearer chart.
- Width/Height** -- Determine the size of the chart as a percentage of the size of the panel in which the chart displays. Typically, 100 percent works well and provides a sufficient white space border. However, if you wanted the chart to occupy 90 percent of the panel, which results in a panel with a larger border of white space, you could enter "90" for these values.
- Show Legend** -- Set this option to Yes if you want the chart to display an example of each of the colors it uses and label each these colors with what the color represents.
- Legend Location** -- Specifies the location of the legend within the chart's frame. Choose from Right, Left, Top, or Bottom.

- **Show Data Tips?** -- If you want the user to be able to mouse over an element of the chart to receive the exact data that the chart represents, set this option to Yes. Data tips provide the calculation formula that the view executes, the grouping field, and the calculated data.
- **Background Color** -- Displays an alpha-numeric value (the hex or RGB value) representing the background color against which the chart is set.
- **Fill Type** -- Determines the fill for the elements of the chart. Choose from Solid, Linear Gradient, or Radial Gradient. The system will start with the color you specify in Fill Color; for charts with more than one grouping field, the system will start from default colors.
 - A linear gradient specifies a gradual color transition in the fill color that starts at the boundary of the chart element.
 - A radial gradient specifies a gradual color transition in the fill color that radiates out from the center of the chart element.
- **Fill Color** -- Displays an alpha-numeric value (the hex or RGB value) representing the color of a single series column or bar chart. For charts with more than one series, the program uses default colors.
- **Percent Gradient Change** -- If you chose Linear Gradient or Radial Gradient as the Fill Type, you need to set this option to specify the ratio by which to change the color. Valid values range from 0.0 to 1.0.
- **Percent Transparency** -- If you chose Linear Gradient or Radial Gradient as the Fill Type, you need to set this option to specify the ratio by which to make the color transparent. The valid values are 0.0 (invisible) through 1.0 (opaque).

Note: If Percent Gradient Change and Percent Transparency are not specified for a Fill Type of Linear Gradient or Radial Gradient, the chart uses a default setting.

- **Label Position (Data Axis)** -- Use this option to add data labels and set the position of the labels. For pie charts, you can choose from all options. For bar charts and column charts, the callout options are not available.
 - None
 - Outside
 - Inside
 - Callout
 - Inside with callout
- **Label Rotation (Data Axis)** -- Enter the angle at which to rotate the label, if any.
- **Auto-Calculate Tick Size Interval** -- Set to Yes to have the system automatically set the intervals for the data axis based on the values that the chart displays. If you would like to set your own increments, set this option to No and complete the below option.
- **Tick Size Interval** -- Defines the increment size of the labels on the data axis. For example, if the value is 500, the data axis label will show: 0, 500, 1000, 1500, and so on.
- **Enable Drilldown?** -- Check this option if you wish the user to be able to click on the chart to drill down to detailed information. For example, if you create a column chart that summarizes area by postal code, the user can double click on the column to invoke a pop-up displaying the records that contribute to this total.



Skill 7: Setting Characteristics for Paginated Reports

Using the View Definition Wizard, you can create paginated reports, including reports that have parent data bands. This topic describes how to set options for these data-only paginated reports.

Employees by Building
Page 1 of 2
September 4, 2009

Building Code	Building Name	Rentable Area	Usable Area	Employee Headcount	Max. Bldg. Occupancy	Avg. Area per Emp.	Building Graphic
HQ	Headquarters	40,315.96	32,960.60	75	0	0.0	hq.png

Building Code	Floor Code	Room Code	Employee Name	Email Address	Employee Telephone
HQ	15	124	ABROL, SHARON	sharon_abrol@tgd.com	
HQ	15	127	ACEVEDO, BRETT	brett_acevedo@tgd.com	
HQ	15	125	ACHARYA, JUANA	juana_acharya@tgd.com	
HQ	15	101	AJAYI, DAVID	david_ajayi@tgd.com	
HQ	15	101	BUGLIONE, JENNIFER	jennifer_buglione@tgd.com	
HQ	15	102	BUKER, KRISTINE	kristine_buker@tgd.com	
HQ	15	102	BULL, ANTHONY	anthony_bull@tgd.com	
HQ	15	104	BUNNELL, MELANIE	melanie_bunnell@tgd.com	
HQ	15	105	BUQUICCHIO, RANDOLPH	randolph_buquicchio@tgd.com	
HQ	15	106	BURDI, MONICA	monica_burdi@tgd.com	
HQ	17	105	ABERNATHY, ALISON	abernathy_alison@tgd.com	338-1011
HQ	17	103	ADAMS, CHRIS	adams_chris@tgd.com	338-1011

- Click the Select Fields button to select the fields to display in the view:
 - For the drill-down tables (parent bands), you must include the field whose data you want to use as a drill-down category. For example, if you want to show Rooms by Room Standard, you must select the Room Standard field (rm_std) as one of the fields for the drill-down table.
 - For tables that are drill-down categories (parent bands), you must select the field to use as a restriction by selecting the Restriction Parameter check box for the field. For example, the Room Standard field (rm_std) would be the restriction parameter when reporting on Rooms by Room Standard.
 - For child bands, you must select the field that its parent band is restricting by. For example, for the report Rooms by Room Standard, you must select Room Standard (rm_std) as one of the fields for the child band.
 - If there are two parent bands, such as when creating a report that shows rooms by their floor and building, the Building Code field (bl_id) is the field that the report restricts by. It must be selected for the two drill-down tables (Building and Floor tables), and for the data table (Rooms table).

View Summary | Select Fields | Select Sort Order | Add Standard | Set Restriction | Set Options

Summary of View Characteristics Start Over | Continue to Preview ==>

Use the buttons below to change the characteristics of this view.

View title:

	Field	Select Fields	Set Sort Order	Add Standard	Set Restriction	Set Options
Top-level drill-down table:	bl	<input checked="" type="checkbox"/>	Optional	Optional	Optional	Optional
Drill-down table:	fl	<input checked="" type="checkbox"/>	Optional	Optional	Optional	Optional
Data table:	em	<input checked="" type="checkbox"/>	Optional	Optional	Optional	Optional

2. To set options for grouping, statistics, and pagination for the paginated report:

Set View Options Reset | Save and Return to Summary

Panel title:

Set Grouping and Statistics

Format for this data band: ▼

Insert Page Breaks Before? ▼

Summarize the data in this data band by its sort order?:

Field	Name	Count	Sum	Avg	Count Percentage	Sum Percentage	Average Percentage
Building Code	bl_id	<input checked="" type="checkbox"/>			<input type="checkbox"/>		
Floor Code	fl_id	<input checked="" type="checkbox"/>			<input type="checkbox"/>		
Room Code	rm_id	<input type="checkbox"/>			<input type="checkbox"/>		
Employee Name	em_id	<input type="checkbox"/>			<input type="checkbox"/>		
Email Address	email	<input type="checkbox"/>			<input type="checkbox"/>		
Employee Telephone	phone	<input type="checkbox"/>			<input type="checkbox"/>		

Set Paginated Report Options

Document Template: ▼

Orientation: ▼

Show Date in Header?: ▼

Show Logo in Header?: ▼

Logo Image File:

Show Bar Codes?: ▼

- Click the Set Options button for the data band you want to set these options for.
- **Panel Title:** Enter the title for this panel in the Report Title field.

- **Format for the data band:** Choose a format based on how the view should display the data.
 - Table style to show titles in the first row and data in subsequent rows:

Room Code	Floor Code	Building Code	Room Area
109	02	XC	288.00
120	02	XC	36.00
121	02	XC	36.00
130	02	XC	36.00

- Column-Style in 1 Column to display titles in one column, and data in the next.

Room Code	109
Floor Code	02
Building Code	XC
Room Area	288.00

- Column-Style in 2 Columns to alternate titles and data with two titles per row.

Room Code	109	Floor Code	02
Building Code	XC	Room Area	288.00

- Column style in 3 Columns to alternate titles and data with three titles per row:

Room Code	109	Floor Code	02	Building Code	XC
------------------	-----	-------------------	----	----------------------	----

- **Summarize Data in this Band by its sort order?:** This must be set to Yes if you want to set statistics for this data band. You can select the count, sum, average, count percentage, sum percentage, and average percentage. If set to No, you can only set the total. The total is displayed below the data band.

Note: Any data band can be a summary band, that is it can present summary or aggregate results (for example, rooms summarized by standards) rather than a list (for example, a list of rooms). If you set options for summarizing data for a parent band, the report includes a band that gives overall totals.

- **Insert Page Breaks Before?:** If Yes, the report starts a new page when this data band advances to a new record. For example, if the report shows Rooms by Room Standards, each new room standard begins on a new page if you have this option set to Yes.
- Set the paginated report options as follows:
 - Document Template: This determines the paper size,
 - Orientation : Portrait or Landscape.
 - Show Logo in Header?: If yes, then enter the file name for the log on the Logo Image File field. The program looks for the image file first in the project graphics folder, and then in the program graphics folder.
 - Show Date in Header? : If Yes, the system inserts the date the report was run, rather than the date the report is printed, as Word does by default.
 - Show Bar Codes? ; If Yes, fields with an A/FM Type of "Barcode" are printed using the "barcode" paragraph style that prints as a set of vertical bar codes, rather than numbers.

Skill 8: Setting Characteristics for Paginated Reports with Drawings

From the View Definition Wizard, you can create two kinds of paginated reports that include drawings:

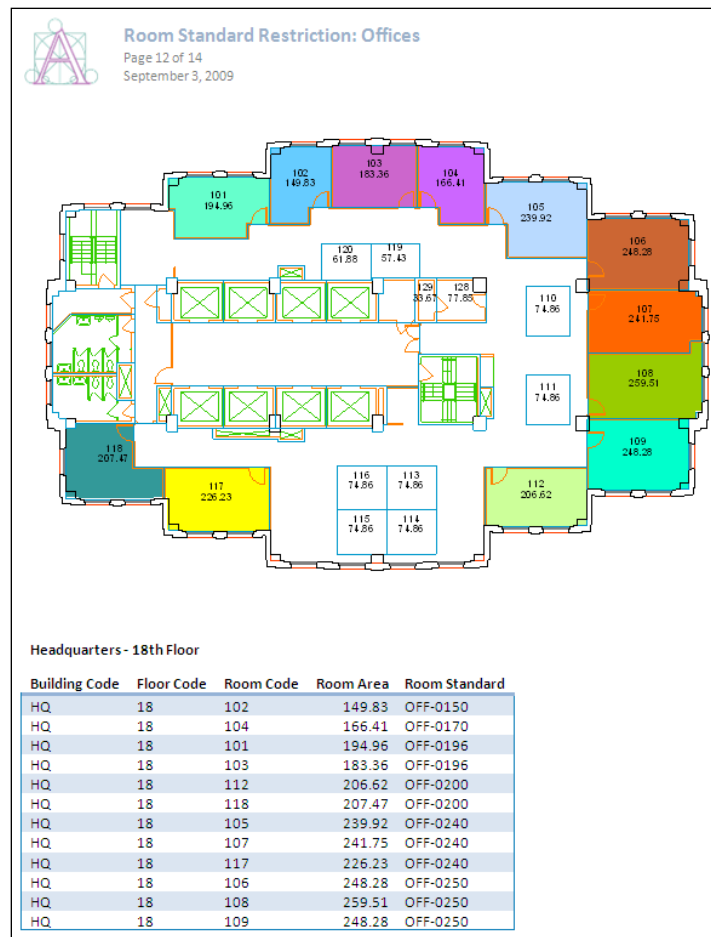
- A paginated report that includes a highlighted drawing. A highlighted drawing shows the drawing highlighted by the restriction you set. It shows a single value; for example, a report that includes a drawing highlighting those rooms that are executive offices.
- A paginated report that thematically highlights a drawing. A thematically highlighted drawing color-codes multiple values; for example, a drawing that shows rooms color coded by their department or by their

Set Characteristics for Highlighted Drawings

There are three types of data that you can select: Drawing Highlight Data, Drawing Label Data, and Drawing Legend Data. Use the following guidelines when making your selections:

- You must select fields for the Drawing Highlight Data. You must also set the sort order, and a restriction. In this case the restriction field will be the field you are highlighting by.
- For the Drawing Legends Data, you can keep the default selection for the "Use same selections in legend data (fields, sorts, standards, restrictions) as highlight data" check box. When you keep this default selection, you do not need to make selections for the Drawing Legends data.
- Drawing Label Data is optional. Drawing Label Data is the group of asset text fields that you want to appear as labels on the drawing. If you do not want any labels to appear, do not select any fields. By default, no fields are selected.

Example: Rooms with a Restriction on Room Standard 'Like' "O%"

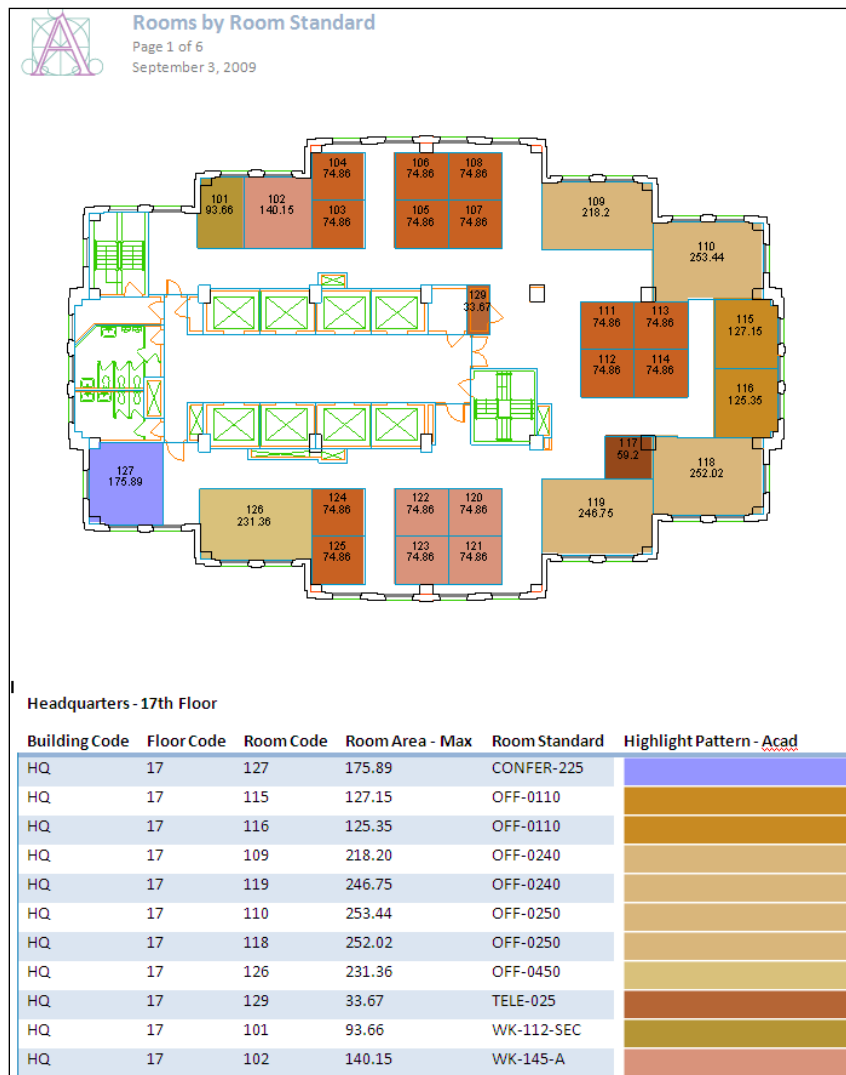


Set Characteristics for Thematically Highlighted Drawings

You can make selections for Drawing Highlight Data, Drawing Label data, and Drawing Legend data:

- You must select data for highlighting, and legend data.
- For thematically highlighted drawings, for highlighting and legend data, you must select fields, and set the sort order. You will most likely want to add a Standard (an additional table) to add related information.
- When you add fields for a Standard table, the Select Fields automatically fills in with the same fields, so selecting Standards fields first can be the simplest way to select fields.
- You can keep the default selection for the "Use same selections in legend data (fields, sorts, standards, restrictions) as highlight data" check box. When you keep this default selection, you do not need to make selections for the drawing legends data.

Example: Rooms by Room Standard with the room standard highlight pattern-acad field chosen as a standard field.



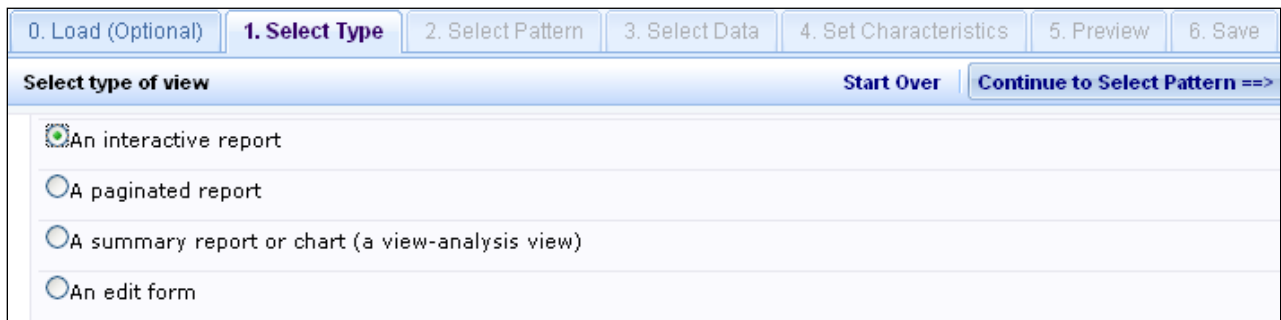
Procedure: Defining Web Views

Once the basics of the View Definition Wizard are understood, a user must become comfortable with each of the steps involved in creating views. The steps below provide a detailed explanation of each step in the process. In this example, you will create a “Rooms By Room Standard” report allowing you to view the rooms assigned to each department and then send the report to PDF or Excel.

Step 1: Select the Type of View

When the View Definition Wizard opens, the first step is to choose an interactive report, a paginated report, an edit form, or a summary report.

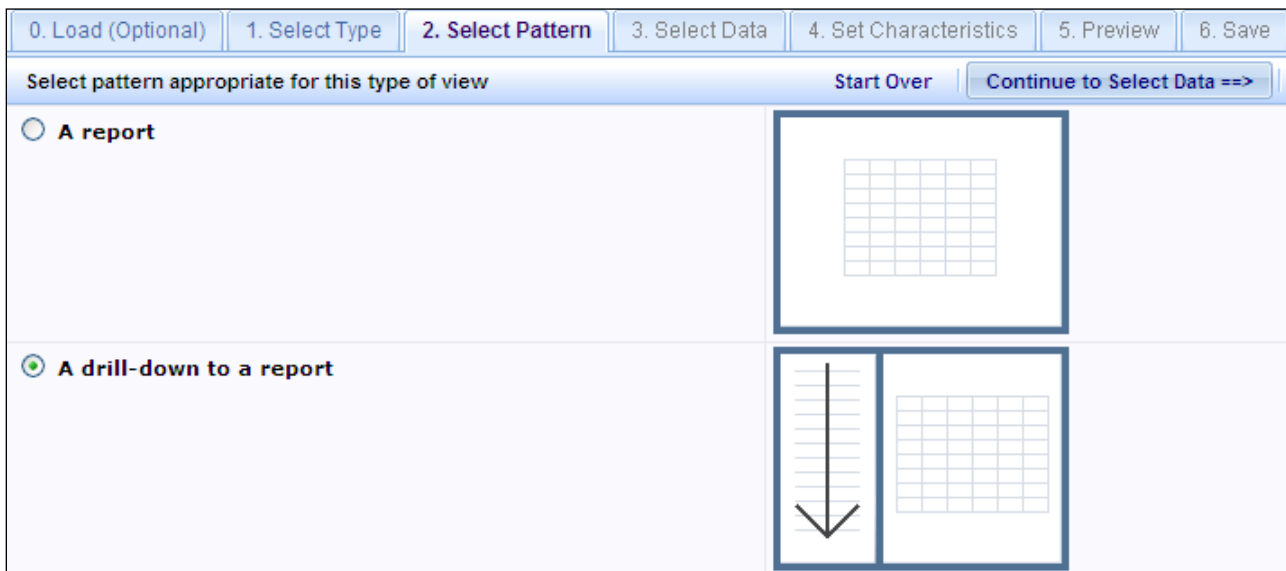
1. In the Web Central application, use the Process Navigator to navigate to the System Administration > Add-In Manager process.
2. Click on the task called “Run View Definition Wizard.”
3. Choose “An interactive report” and press either the “Continue to Select Pattern” panel button or the “2. Select Pattern” tab.



Step 2: Select the View’s Pattern

Based on the type of view you selected in Step 1, the Wizard will present you with the options for this type of view. Each option has a diagram that shows the basic layout of the view.

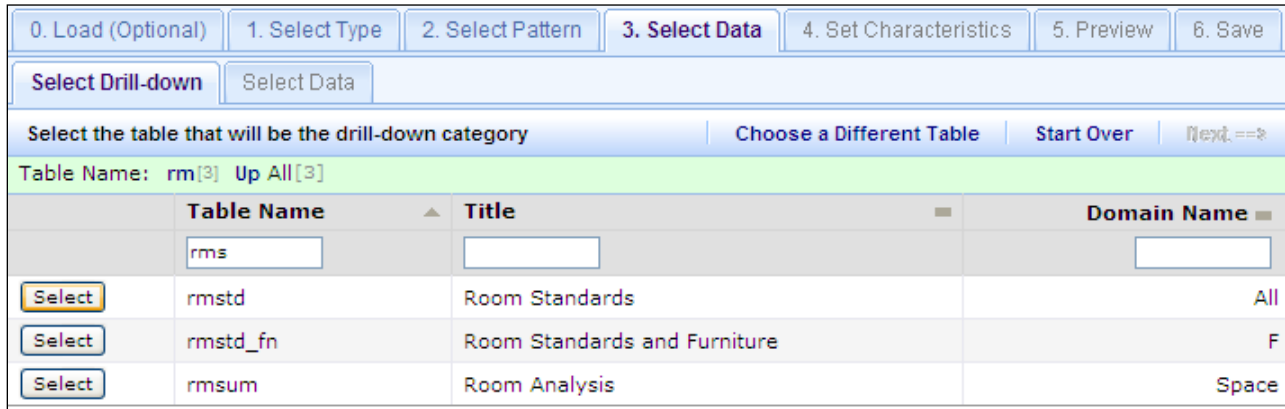
1. For a “Rooms by Standard Report,” choose “A drill-down to a report” and press the “Continue to Select Data” panel button or the “3. Select Data” tab.



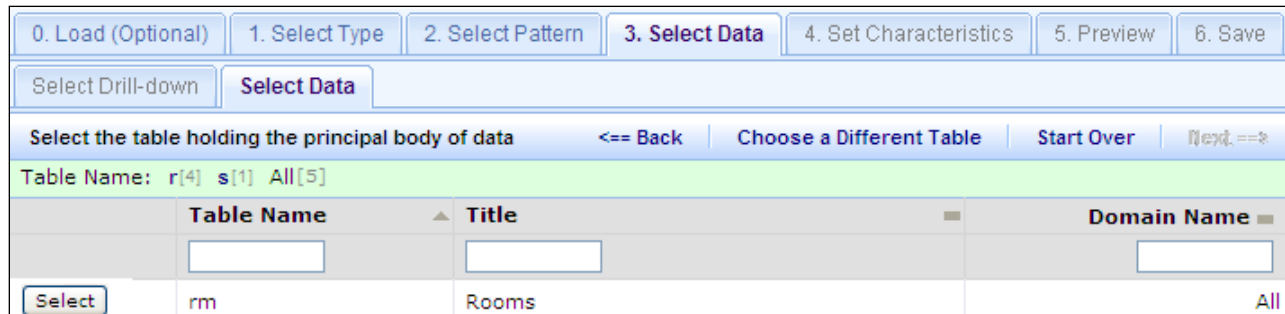
Step 3: Select the Tables to Include

Now, you specify the tables that the view presents. If you are defining a view with multiple tables, the Wizard restricts you to selecting tables appropriate for your previous selection. For example, if you are working on a two-level drill-down view and you choose Buildings as your first drill-down level, you must choose for your second drill-down level a table that contains the Building Code field.

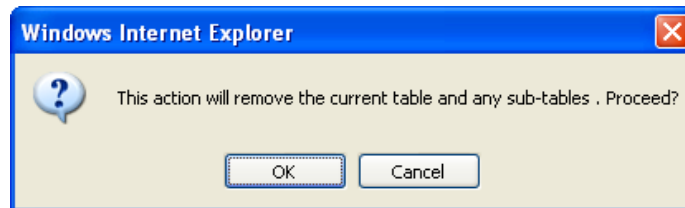
1. Choose the Room Standards table by clicking on the “Select” button to the left of the “rmstd” table when on the “Select Drill-Down” tab. This table will specify the data that shows up in the drill-down panel on the left-hand side of the view.



2. Choose the rooms table by clicking on the “Select” button to the left of the “rm” table when on the “Select Data” tab. This table will specify the data that shows up in the main panel of the view.



3. If you would like to change your choices for any reason, you can use the “Back” and “Next” buttons to go back and change the tables you chose. Press the “Choose a Different Table” button on the panel bar to give you the option to choose a different table for the panel you are working on. When you press the button, a pop-up window like the one below will ask you to verify that you want to change the view. Just press “OK”.



Step 4: Set Characteristics of the View

When setting characteristics for the view, the minimum requirements are to select fields for each of the panels being displayed. Previewing the view after selecting fields ensures that the basic view structure is correct before filling out the rest of the characteristics of the report. For the example report, “Rooms by Room Standard,” set the basic characteristics by following these steps:

1. Change the title of the view to “Rooms by Room Standard”.
2. Click on the Select Fields button next to the RMSTD table and choose the room standard codes for display in the drill down panel. Use the Up, Down, and Remove buttons to determine what order the columns on your report will appear in. When finished, choose the “Save and Return to Summary” button.

0. Load (Optional) | 1. Select Type | 2. Select Pattern | 3. Select Data | **4. Set Characteristics** | 5. Preview | 6. Save | 7. Finish

View Summary | **Select Fields** | Select Sort Order | Add Standard | Set Restriction | Set Options

Reorder fields that are already visible in the view Reset | Save and Return to Summary

Field Name	Multi-line Heading	Data Type	A/FM Type	Primary Key	Table	
rm_std	Room Standard	Char	None	1	rmstd	Remove Up Dn
description	Standard Description	Char	Desc	0	rmstd	Remove Up Dn
cost_of_space	Cost of Space	Numeric	None	0	rmstd	Remove Up Dn

Select additional fields to appear in the view

<input type="checkbox"/>	Field Name	Multi-Line Heading	Data Type	Primary Key	Table Name	A/FM Type
<input type="checkbox"/>						
<input checked="" type="checkbox"/>	rm_std	Room Standard	Char	1	rmstd	None
<input type="checkbox"/>	area	Total Area	Numeric	0	rmstd	None
<input type="checkbox"/>	area_avg	Average Area per Standard	Numeric	0	rmstd	Calculated
<input type="checkbox"/>	cost_of_em	Cost of Personnel	Numeric	0	rmstd	None
<input type="checkbox"/>	cost_of_furn	Cost of Furnishing	Numeric	0	rmstd	None
<input type="checkbox"/>	cost_of_move	Cost of Moving	Numeric	0	rmstd	None
<input checked="" type="checkbox"/>	cost_of_space	Cost of Space	Numeric	0	rmstd	None

3. Click on the Select Fields button next to the RM table and choose to display the building, floor, and room codes for display in the view panel. Use the Up, Down, and Remove buttons to determine what order the columns on your report will appear in. When finished, choose the “Save and Return to Summary” button.
4. Because selecting fields to display is the only required characteristic of a report, it is possible to move to the next step to preview the report.
5. Press the “Continue to Preview” button.

Step 5: Preview your View

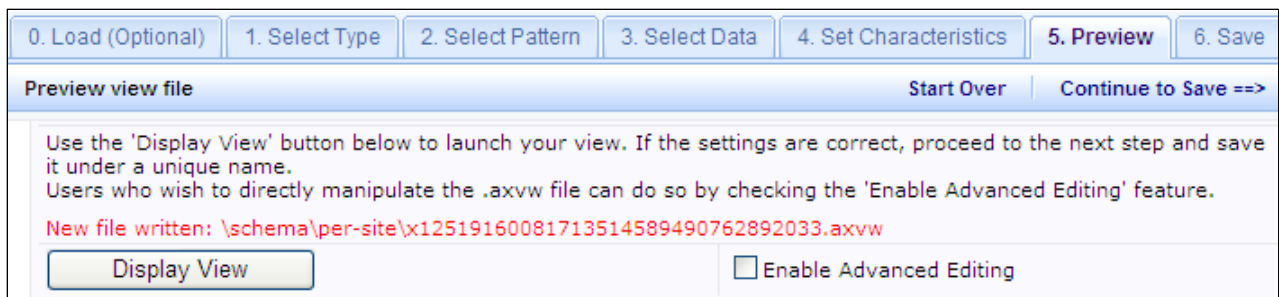
You may wish to completely define your view before examining it, or examine the view after defining each property. In the Preview step, choose the Display View button and the Wizard displays the view in its own window. Examine the view and then optionally return to the Wizard's other steps to change your settings or define new settings. Make your changes and redisplay the view.

If you have not specified enough information for the type of view, the Wizard will notify you when it attempts to display the view. For example, if you have chosen to create a view-analysis view but you have not specified a calculation, the Wizard will not be able to display the view and will notify that the view is missing its calculations.

You may find that the View Definition Wizard does not provide all the options that you want to include in your view. For adding advanced properties to your view, you can directly edit the generated code of the .AVXW file by choosing the Enable Advanced Editing option from the Preview step. The Wizard displays the code of the .AVXW file, which you can then edit. Make your edits and save your changes. You can then use the Display View button to display the changed view.

When you save your changes at this point, the View Definition Wizard writes the changes to a default file that is stored temporarily on your web server. You can specify your own file name in the next step.

1. On the Preview tab, press the “Display View” button to call up the report.



2. View the report and verify that the report displays as expected. You now see a listing of rooms by room standard.

Rooms by Room Standard					
Standard Rooms		Refresh	Room Area and Cost		
Room Standard	Standard Description		Building Code	Floor Code	Room Code
CONFERENCE	Typical Conference Room		HQ	15	101
FILE	Filing Cabinets		HQ	15	103
KITCHEN	Kitchen		HQ	15	104
LAB-A	Laboratory Type A		HQ	17	109
LAB-B	Laboratory Type B		HQ	18	112
LAB-B	Laboratory Type B		HQ	18	118
LOBBY	Lobby Area		HQ	19	101
OFF-10X24	10 x 24 Standard Office		HQ	19	103
OFF-A	Office Type A		HQ	19	109
OFF-B	Office Type B		HQ	19	112
OFF-C	Office Type C		XC	02	202

- Return to Step 4 of the View Definition Wizard and set sorts, standard fields, restrictions, and any other desired options. In the example below, the report has been sorted by floor and room, restricted to the HQ building, and displays the room area, chargeable area, standard cost of space from the room standard table (RMSTD), and chargeable cost. The report becomes more useful now in that it shows that costs of standard spaces may be set a little low.

Standard Rooms		Refresh	Room Area and Cost					Refresh	PDF	XLS
Room Standard	Standard Description		Building Code	Floor Code	Room Code	Room Area	Chargeable Area	Cost of Space	Chargeable Cost	
CONFERENCE	Typical Conference Room		HQ	15	101	194.96	280.08	6,000.00	5,601.60	
FILE	Filing Cabinets		HQ	15	103	183.36	263.43	6,000.00	5,268.60	
KITCHEN	Kitchen		HQ	15	104	166.41	239.07	6,000.00	4,781.40	
LAB-A	Laboratory Type A		HQ	17	109	218.20	318.73	6,000.00	6,055.87	
LAB-B	Laboratory Type B		HQ	18	112	206.62	309.16	6,000.00	6,183.20	
LAB-B	Laboratory Type B		HQ	18	118	207.47	310.44	6,000.00	6,208.80	
LOBBY	Lobby Area		HQ	19	101	291.32	387.60	6,000.00	8,527.20	
OFF-10X24	10 x 24 Standard Office		HQ	19	103	280.23	372.84	6,000.00	8,202.48	
OFF-A	Office Type A		HQ	19	109	334.53	445.08	6,000.00	9,791.76	
OFF-B	Office Type B		HQ	19	112	333.07	443.15	6,000.00	9,749.30	

- If there are changes to the report that you'd like to make but can't using the default options in the View Definition Wizard, you can edit the report directly by clicking on the "Enable Advanced Editing" checkbox, making changes to the code, and clicking on the "Save Changes" button. The advanced editing will allow you to make most any desired cosmetic or functional change.

Display View
 Enable Advanced Editing
Save Changes

```

<view version="2.0">
  <designInfo type="report" pattern="ab-viewdef-report-drilldown"
  isAlterable="true"/>
  <layout file="pkey-tree.axvw"/>
  <title translatable="true">Rooms by Room Standard</title>

  <dataSource id="abViewdefReportDrilldown_ds_0">
    <table name="rmstd" role="main"/>
    <field table="rmstd" name="rm_std"/>
    <field table="rmstd" name="description"/>
    <field table="rmstd" name="cost_of_space"/>
  </dataSource>
  
```

- For example, changing the report title in the code and clicking "Save Changes" will automatically change the view's title. Make the following change in code, and view the results:

```
<title translatable="true">Room Standard vs. Chargeable Cost</title>
```

Standard Rooms			Refresh	Room Area and Cost				
Room Standard	Standard Description	Cost of Space		Building Code	Floor Code	Room Code	Room Area	Chargeable Area
CONFERENCE	Typical Conference Room	9,000.00		HQ	15	122	248.28	248.28
				HQ	17	127	175.89	256.93

- When the report is finished, click on the "Continue to Save" button on the panel bar.

Step 6: Save Your View

When you are satisfied with the appearance of your view, you can save it to an .AXVW file of your choice. First, specify the activity and process or role to which the view belongs by choosing existing values from the lists. Remember to choose an activity for which you are licensed. Then, enter the name of the .AXVW file to which you want to save the view. Be sure to include the .AXVW file extension.

Choose the Save View File button in the upper right corner, and the View Definition Wizard writes your settings to the specified view file and saves the file in:

```
..\archibus\schema\per-site\converted-files\<<activities subfolder>
```

1. Choose an activity where the report should reside. In the case of a “Rooms by Standard” report which displays standard costs, it may be appropriate to choose the activity “AbSpaceRoomInventory” and the process “Space Manager”.
2. Choose a report name. In the example below, we have chosen “demo1520_rooms_by_room_standards.axvw”

0. Load (Optional)		1. Select Type		2. Select Pattern		3. Select Data		4. Set Characteristics		5. Preview		6. Save			
Save view file												Start Over		Save View File	
Select the activity and process for your new view. Enter a name to save the file, which must end w															
Activity:*		AbSpaceRoomInventoryB...													
Process or Role:*		Space Manager													
Name to save file as:		demo1520_rooms_by_room_standards_report.axvw													

3. Press the “Save View File” button.

Step 7: Publish Your View to the Process Navigator” (Optional)

From the View Definition Wizard, you can define a task on the Process Navigator and connect your view to this task. To do so, follow these steps:

1. Choose the Publish to Process Navigator button from the Save screen. The View Definition Wizard displays the tasks for the Process/Role and Activity defined in Step 6.
2. Locate the task beneath which you want the new task to appear on the Process Navigator.
3. Choose Add New. The View Definition Wizard displays a row with a display order value. Specify the title of the task and if it should appear on the Hotlist. Optionally, you can reposition the task by changing the value for the display order.
4. Choose the Save button and the Wizard creates the record defining this task.
5. From the Process Navigator, load the new task and verify your new view.

0. Load (Optional) 1. Select Type 2. Select Pattern 3. Select Data 4. Set Characteristics 5. Preview 6. Save 7. Publish (Optional)					
Add view to Process Navigator or to My Favorites					
				Create New View File	Convert New View File
	Activity	Process or Role	Task	Add to My Favorites?	Display Order
<input type="button" value="Add New"/>	AbSpaceRoomInventoryBAR	Space Manager	View Departments by:	No	100
<input type="button" value="Add New"/>	AbSpaceRoomInventoryBAR	Space Manager Dash	Assign Divisions and Departments to Rooms	No	100
<input type="button" value="Add New"/>	AbSpaceRoomInventoryBAR	Space Manager Dash 1	... Floor	No	100
<input type="button" value="Add New"/>	AbSpaceRoomInventoryBAR	Space Manager Dash 2	Show Departmental Analysis Chart	No	100
<input type="button" value="Add New"/>	AbSpaceRoomInventoryBAR	Space Manager	... All Departments	No	200
<input type="button" value="Add New"/>	AbSpaceRoomInventoryBAR	Space Manager Dash 1	... Departments per Floor	No	200
<input type="button" value="Add New"/>	AbSpaceRoomInventoryBAR	Space Manager Dash 2	Show Departmental Stack Plan	No	200
<input type="button" value="Add New"/>	AbSpaceRoomInventoryBAR	Space Manager	... Building	No	300
<input type="button" value="Add New"/>	AbSpaceRoomInventoryBAR	Space Manager	... Floor	No	400
<input type="button" value="Add New"/>	AbSpaceRoomInventoryBAR	Space Manager	... Departments per Floor	No	500
<input type="button" value="Add New"/>	AbSpaceRoomInventoryBAR	Space Manager	-	No	600
<input type="button" value="Add New"/>	AbSpaceRoomInventoryBAR	Space Manager	View Remaining Area	No	700
<input type="button" value="Add New"/>	AbSpaceRoomInventoryBAR	Space Manager	Show Departmental Stack Plan	No	800
<input type="button" value="Add New"/>	AbSpaceRoomInventoryBAR	Space Manager	Show Departmental Analysis Chart	No	900
<input type="button" value="Add New"/>	AbSpaceRoomInventoryBAR	Space Manager	Room vs. Standard Costs and Area	No	1000

If you wanted to begin working on a new report, you could choose to “Create” or “Convert” new view files by pressing the corresponding buttons on the panel bar of this view.

Space Planning & Management		Room Standard Costs vs. Chargeable Costs								
Space Inventory & Performance		Standard Rooms			Room Area and Costs					
Space Manager		Refresh			Refresh PDF XLS					
Tasks:		Room Standard	Standard Description	Building Code	Floor Code	Room Code	Room Area	Chargeable Area	Chargeable Cost	Cost of Space
View Departments by:		CONFERENCE	Typical Conference Room	HQ	15	101	194.96	280.08	5,601.60	6,000.00
<input type="checkbox"/> ... All Departments		FILE	Filing Cabinets	HQ	15	103	183.36	263.43	5,268.60	6,000.00
<input type="checkbox"/> ... Building		KITCHEN	Kitchen	HQ	15	104	166.41	239.07	4,781.40	6,000.00
<input type="checkbox"/> ... Floor		LAB-A	Laboratory Type A	HQ	17	109	218.20	318.73	6,055.87	6,000.00
<input type="checkbox"/> ... Departments per Floor		LAB-B	Laboratory Type B	HQ	18	112	206.62	309.16	6,183.20	6,000.00
<input type="checkbox"/> View Remaining Area		LOBBY	Lobby Area	HQ	18	118	207.47	310.44	6,208.80	6,000.00
<input type="checkbox"/> Show Departmental Stack Plan		OFF-10X24	10 x 24 Standard Office	HQ	19	101	291.32	387.60	8,527.20	6,000.00
<input type="checkbox"/> Show Departmental Analysis Chart		OFF-A	Office Type A	HQ	19	103	280.23	372.84	8,202.48	6,000.00
<input checked="" type="checkbox"/> Room vs. Standard Costs and Areas		OFF-B	Office Type B	HQ	19	109	334.53	445.08	9,791.76	6,000.00
		OFF-C	Office Type C	HQ	19	112	333.07	443.15	9,749.30	6,000.00
		OFF-D	Office Type D							
		OFF-EXEC	Executive Office							
		OFF-EXECSR	Senior Executive Office							

Step 0: Load an Existing View to Alter or Convert

Steps 1 through 7 are used for creating a view. When you don't need to create a view and just want to modify an existing view or convert a view from a previous version of ARCHIBUS, the "Step 0: Load" tab can alter an existing 16.3 web view or convert **either** a pre-16.3 Web view (.axvw) or Windows view (.avw) to the 16.3 format.

Using the Load step, you can make a simple change, such as field visibility, or make more significant changes such as changing the type or format of the view. Or, more simply, let the application convert an existing file to the new format. The View Definition Wizard examines the tables previously defined for the view and presents you with appropriate choices for the type and format of the view.

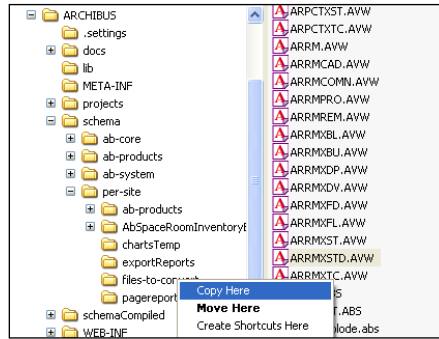
Follow this basic process:

1. Using Windows Explorer or some other Windows tool, copy the view file that you wish to convert to the `..\per-site\files-to-convert` folder, such as:
 - `C:\Program Files\Afmxx\tools\tomcat\webapps\archibus\schema\per-site\files-to-convert`
2. In the View Definition Wizard, choose the Load button. The system lists all views in the `..\per-site\files-to-convert` folder.
3. In the list box, click on the view that you want to alter.
 - If it is a Web view and you want to display it in its current format, choose Display Selected View.
 - If you are converting a Windows view, you cannot first display it.
4. Choose "Load View and Continue to Select Type" and the wizard loads the selected view into the View Definition Wizard so that you can convert it.
5. Follow the steps as you would a new view. The difference will be that all options have been set based on the loaded view. You should only change the options if you wish to change the view.

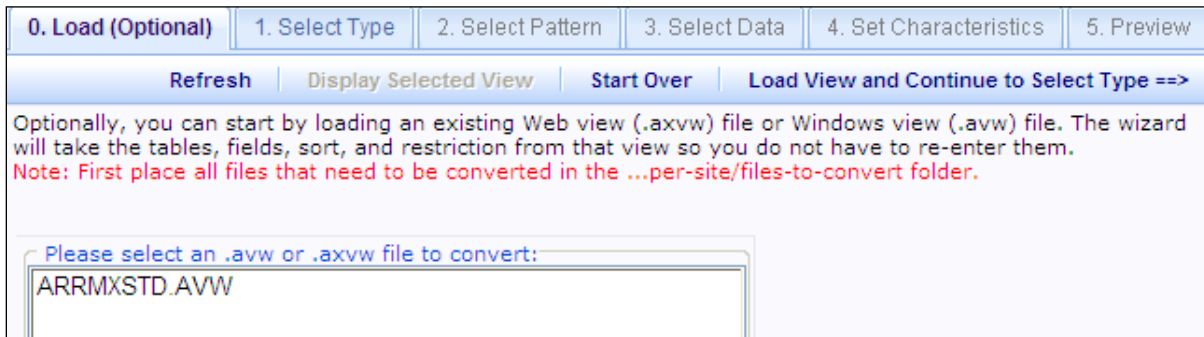
In Steps 1 through 7, you created a "Rooms By Room Standard" report. Rather than creating a report from scratch, you could have used the View Definition Wizard to convert a view from the ARCHIBUS Windows product like the "Rooms By Standard" report (ARRMXSTD.avw). Below are the steps you would have taken.

Rooms by Standard							
Page 1							
09/02/2009							
Room Standard	Total Area	Room Std. Count	Average Area per Standard				
CONFERENC	1,348.17	8	168.52				
Building Code	Floor Code	Room Code	Room Area	Room Category	Room Type	Division Code	Department Code
HQ	15	122	248.28	SERV	SERVICE	FACILITIES	CONSTR
HQ	17	127	175.89	SUPPORT	CONFERENC	FINANCE	DOMEST
XC	02	208	176.00				
XC	02	210	132.00				
XC	04	108	176.00				
XC	04	110	132.00				
XC	04	208	176.00				
XC	04	210	132.00				
Room Standard	Total Area	Room Std. Count	Average Area per Standard				
FILE	432.00	12	36.00				
Building Code	Floor Code	Room Code	Room Area	Room Category	Room Type	Division Code	Department Code
XC	02	170-S	36.00				
XC	02	171-S	36.00				
XC	02	172-S	36.00				
XC	02	270-S	36.00				
XC	02	271-S	36.00				
XC	02	272-S	36.00				

1. Copy ARRMXSTD.avw from the C:\Program Files\Afm18\Schema\Common folder to the C:\Documents and Setting\All Users\ARCHIBUS\schemaper-site\files-to-convert folder.



2. In the View Definition Wizard, go to step 0 and select the ARRMXDP.AVW file and choose to “Load View and Continue to Select Type.”



3. Follow Steps 1 through 7 making changes as necessary. When you reach Step 5 to preview the report, it should look like the example below:

Room Standards				Rooms							
Room Standard	Total Area	Room Std. Count	Average Area per Standard	Building Code	Floor Code	Room Code	Room Area	Room Category	Room Type	Division Code	Department Code
OFF-10X24	0.00	0	0.00	XC	02	208	176.00				
OFF-A	3,472.17	22	157.83	XC	02	210	132.00				
OFF-B	2,580.54	16	161.28	XC	04	108	176.00				
OFF-C	238.49	2	119.25	XC	04	110	132.00				
OFF-D	0.00	0	0.00	XC	04	208	176.00				
OFF-EXEC	2,219.48	9	246.61	XC	04	210	132.00				
OFF-EXEC	2,219.48	9	246.61	HQ	17	127	175.89	SUPPORT	CONFERENCE	FINANCE	DOMESTIC
OFF-EXECSR	969.24	4	242.31	HQ	15	122	248.28	SERV	SERVICE	FACILITIES	CONSTRUCTION
OFF-MGR	628.66	3	209.55								

Advanced Views

The View Definition Wizard can load and interpret one .axvw file. In some situations, a Web view might be comprised of multiple .axvw, .xsl, or .js files. For these advanced views, you can take one of the following approaches:

- For situations with multiple .axvw files, combine the table-groups into one file.
- Use the View Definition Wizard as a starting point to form a basic view, and then add the complexities and customizations to it.
- Create the view from scratch.

Exercise 8211: Create a 2-panel Report

Management would like to encourage departments to use space more frugally. Management realizes that space costs money, so it decides it needs a report showing each department's share of office space and its equivalent cost to get an accurate idea for current space use and cost. Please design a report of "Room Areas by Department."

Rooms by Department - Drill Down Report					Room Details					
Select Department					Room Details					
Division Code	Department Code	Room Area	Chargeable Area	Chargeable Cost	Building Code	Floor Code	Room Code	Room Area	Chargeable Area	Chargeable Cost
ACCESSORIES	DISTRIBUTION	542.00	542.00	0.00	HQ	17	103	74.86	109.35	2,077.65
ACCESSORIES	MARKETING	828.00	828.00	0.00	HQ	18	103	183.36	274.36	5,487.20
ACCESSORIES	SALES	108.00	108.00	0.00	HQ	19	103	280.23	372.84	8,202.48
ELECTRONIC SYS.	ACCOUNTING	0.00	0.00	0.00	XC	04	103	88.00	88.00	0.00
ELECTRONIC SYS.	ADMINISTRATION	0.00	0.00	0.00	XC	04	104	110.00	110.00	0.00
ELECTRONIC SYS.	ENGINEERING	1,348.54	1,969.89	37,427.46	XC	04	130	36.00	36.00	0.00
ELECTRONIC SYS.	MARKETING	0.00	0.00	0.00	XC	04	131	36.00	36.00	0.00
ELECTRONIC SYS.	MARKETING	0.00	0.00	0.00	XC	04	132	36.00	36.00	0.00

Step 1: Select the Type of View

1. In the Web Central application, use the Process Navigator to navigate to the System Administration > Add-In Manager process.
2. Click on the task called "Run View Definition Wizard."
3. Select "Interactive Report" since this view needs to give both the summary and details for each department.

Step 2: Select the View's Pattern

1. Select "A drill-down to a report" in order to use two panels. The first panel will provide a summary of departmental area stored in the department table. If an individual department is selected, this first panel will act as a filter on the second panel, which will display detailed data from the rooms table assigned to the chosen department.

Step 3: Select the Tables to Include

1. Select DP for the department data displayed in the first panel.
2. Select RM for the rooms data displayed in the second panel.

Step 4: Set Characteristics of the View

1. Type a title for the report.
2. Select fields to display from the DP table.
3. Select fields to display from the RM table.
4. Optionally, set sorts, restrictions, standards, and options.

Step 5: Preview your View

1. Press "Continue" to move to the Preview tab.
2. Choose "Display View" to preview view.

Step 6: Save Your View

1. Press “Continue” to move to the Save tab
2. Assign the view to an Activity and Process, and give the view file a name.
3. Press “Save” to create the view file and store it on the network. The file is automatically stored in the “archibus > schema > per-site” folder on the web application server.

Step 7: Publish Your View to the Process Navigator”

1. Press “Continue” to move to the Publish tab and add the view to the Process Navigator
2. Add a new task entry, and click the “Save” button to the right of the record to create an entry on the navigator.
3. Refresh the Process Navigator to view the new task.

Exercise 8212: Create a 3-panel Edit Form with Pop-up Dialog

Management would like to make sure that departmental room allocations are accurate. Management would like a view which allows a space planner to keep each room allocated to the correct department. Please design an edit form for editing “Rooms by Department.”

The screenshot displays the 'Rooms by Department - Edit Form' application. It is divided into three main sections:

- Divisions Panel:** A table with columns: Division Code, Room Area, Chargeable Area, and Chargeable Cost. It lists various divisions like ACCESSORIES, ELECTRONIC SYS., EXECUTIVE, etc.
- Rooms Panel:** A table with columns: Building Code, Floor Code, Room Code, Room Area, Chargeable Area, Chargeable Cost, Division Code, and Department Code. It lists rooms such as HQ 17 101, HQ 17 102, etc.
- Edit Form Panel:** A pop-up dialog for editing a room. It contains fields for: Building Code (HQ), Floor Code (17), Room Code (105), Room Area (74.86), Chargeable Area (109.35), Chargeable Cost (2,077.65), Division Code (ELECTRONIC SYS.), Department Code (ENGINEERING), Room Category (PERS), Room Type (WRKSTATION), Room Standard (WKSTA-TECH), Room Name, and Lease Code.

Step 1: Select the Type of View

1. In the Web Central application, use the Process Navigator to navigate to the System Administration > Add-In Manager process.
2. Click on the task called “Run View Definition Wizard.”
3. Select “An Edit Form” since this view needs to allow a drill-down and edit capability.

Step 2: Select the View’s Pattern

1. Select “A two-level drill-down to a select list with a pop-up edit form” in order to use three panels with a pop-up. The first panel will provide a list of divisions stored in the divisions table. When an a division is selected, the first panel will act as a filter and display a list of departments from the departments table that have been assigned to the chosen division. When a department is chosen, a third panel will display data about each room from the rooms table. A user can then click on a room to edit room details. (Note: A two-panel edit form with a good filter would be a nice alternative to this type of view and would mean less clicks for the user).

Step 3: Select the Tables to Include

1. Select DV for the division data displayed in the first panel.
2. Select DP for the department data displayed in the second panel.
3. Select RM for the room data displayed in the third panel.

Step 4: Set Characteristics of the View

1. Type a title for the report.
2. Select fields to display from the DV table.
3. Select fields to display from the DP table.
4. Select fields to display from the RM table.
5. Optionally, set sorts, restrictions, standards, and options.

Step 5: Preview your View

1. Press “Continue” to move to the Preview tab.
2. Choose “Display View” to preview view.

Step 6: Save Your View

1. Press “Continue” to move to the Save tab
2. Assign the view to an Activity and Process, and give the view file a name.
3. Press “Save” to create the view file and store it on the network. The file is automatically stored in the “archibus > schema > per-site” folder on the web application server.

Step 7: Publish Your View to the Process Navigator”

1. Press “Continue” to move to the Publish tab and add the view to the Process Navigator
2. Add a new task entry, and click the “Save” button to the right of the record to create an entry on the navigator.
3. Refresh the Process Navigator to view the new task.

Exercise 8213: Create a 1-panel Crosstab Report

Management would like to encourage departments to use space more frugally. Management realizes that space costs money, so it decides it needs a report showing each department's share of office space and its equivalent cost. Please design a report of "Room Areas by Department," but use a crosstab report so that management can just see departmental totals and drill down to the details when necessary.

Rooms by Department - Summary Crosstab			
Select Department for Details			Refresh
Department Code	Room Area - Sum	Chargeable Area - Sum	Chargeable Cost - Sum
Total	48,151	20,990	353,952
N/A	32,285	0	0
CONSTRUCTION	2,201	3,054	61,082
DESIGN	940	1,350	27,002
DISTRIBUTION	1,584	1,584	0
DOMESTIC	557	814	15,458
ENGINEERING	2,683	3,977	77,955
MANAGEMENT	4,280	5,862	125,883
MARKETING	1,438	1,657	15,767
OPERATIONS-MAINT	1,110	1,621	30,805
SALES	1,072	1,072	0

Step 1: Select the Type of View

1. In the Web Central application, use the Process Navigator to navigate to the System Administration > Add-In Manager process.
2. Click on the task called "Run View Definition Wizard."
3. Select "A Summary Report or Chart" since this view will only summarize departmental data.

Step 2: Select the View's Pattern

1. Select "A Summary Report" in order to view departmental totals in a chart or graph. The first panel will provide a chart of department data. A user can click on a department to view room details.

Step 3: Select the Tables to Include

1. Select RM for the room data displayed in the panel.

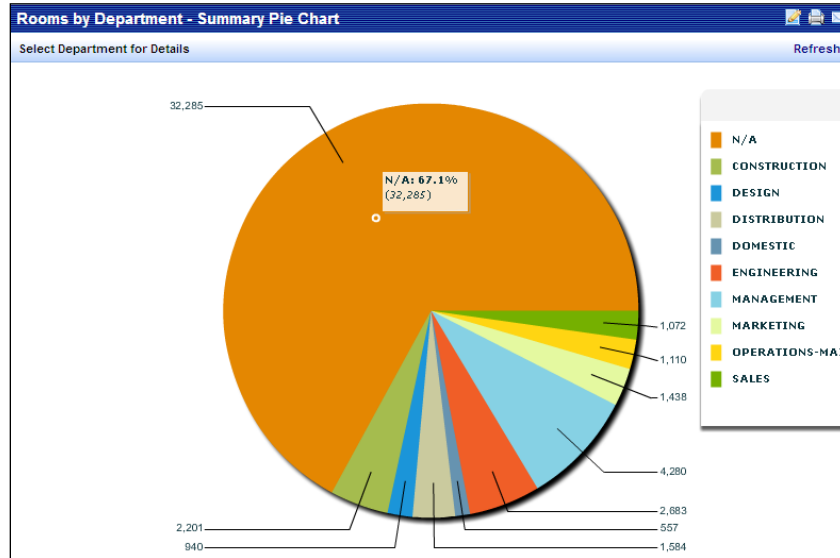
Step 4: Set Characteristics of the View

1. Type a title for the report.
2. Select fields to display from the RM table, making sure to include the grouping and summary fields.
3. Set Sort Order – in this case, by department.
4. Set Options – in this case, for area totals.
5. Optionally, set restrictions and standard fields.

Step 5: Preview, View, and Publish

Exercise 8214: Create a 1-panel Pie Chart

Management would like to encourage departments to use space more frugally. Management realizes that space costs money, so it decides it needs a report showing each department's share of office space and its equivalent cost. Please design a simple pie chart of "Room Areas by Department" so that management can understand departmental allocations with a quick glance.



Step 1: Select the Type of View

1. In the Web Central application, use the Process Navigator to navigate to the System Administration > Add-In Manager process.
2. Click on the task called "Run View Definition Wizard."
3. Select "A Summary Report or Chart" since this view will only summarize departmental data.

Step 2: Select the View's Pattern

1. Select "A Summary Chart" in order to view departmental totals in a chart or graph. The first panel will provide a chart of department data. A user can click on a department to view room details.

Step 3: Select the Tables to Include

1. Select RM for the room data displayed in the panel.

Step 4: Set Characteristics of the View

1. Type a title for the report.
2. Select fields to display from the RM table, making sure to include the grouping and summary fields.
3. Set Sort Order – in this case, by department.
4. Set Options – in this case, for area totals and chart types
5. Optionally, set restrictions and standard fields.

Step 5: Preview, View, and Publish

Exercise 8215: Create a Banded Paginated Report

Management would like to encourage departments to use space more frugally. Management realizes that space costs money, so it decides it needs a report showing each department’s share of office space and its equivalent cost. Please design a report of “Room Areas by Department” so that management can print the report out on paper and pore over the details.

Rooms By Department - Banded Paginated Report
Page 3 of 6
September 4, 2009

Division Code	Department Code	Room Area	Chargeable Area	Chargeable Cost
FACILITIES	CONSTRUCTION	1,953.06	2,805.83	56,116.40

Building Code	Floor Code	Room Code	Room Area	Chargeable Area	Chargeable Cost	Division Code	Department Code
HQ	15	122	248.28	248.28	4,965.60	FACILITIES	CONSTRUCTION
HQ	15	121	259.51	372.83	7,456.60	FACILITIES	CONSTRUCTION
HQ	15	120	74.86	107.54	2,150.80	FACILITIES	CONSTRUCTION
HQ	15	110	241.75	347.30	6,946.00	FACILITIES	CONSTRUCTION
HQ	15	109	248.28	356.69	7,133.80	FACILITIES	CONSTRUCTION
HQ	15	108	74.86	107.54	2,150.80	FACILITIES	CONSTRUCTION
HQ	15	107	57.43	82.51	1,650.20	FACILITIES	CONSTRUCTION
HQ	15	106	61.88	88.90	1,778.00	FACILITIES	CONSTRUCTION
HQ	15	105	239.92	344.68	6,893.60	FACILITIES	CONSTRUCTION
HQ	15	104	166.41	239.07	4,781.40	FACILITIES	CONSTRUCTION
HQ	15	103	183.36	263.43	5,268.60	FACILITIES	CONSTRUCTION
HQ	15	102	149.83	215.25	4,305.00	FACILITIES	CONSTRUCTION
HQ	15	101	194.96	280.08	5,601.60	FACILITIES	CONSTRUCTION

Step 1: Select the Type of View

1. In the Web Central application, use the Process Navigator to navigate to the System Administration > Add-In Manager process.
2. Click on the task called “Run View Definition Wizard.”
3. Select “A Paginated Report” since this view will contain large numbers of records for detailed analysis.

Step 2: Select the View’s Pattern

1. Select “A paginated report with one parent band and one child band” in order to view departmental totals as well as details on the rooms belonging to each department. The first band will provide department data and the second band will provide room data.

Step 3: Select the Tables to Include

1. Select DP for the department data displayed in the first band.
2. Select RM for the rooms data displayed in the second band.

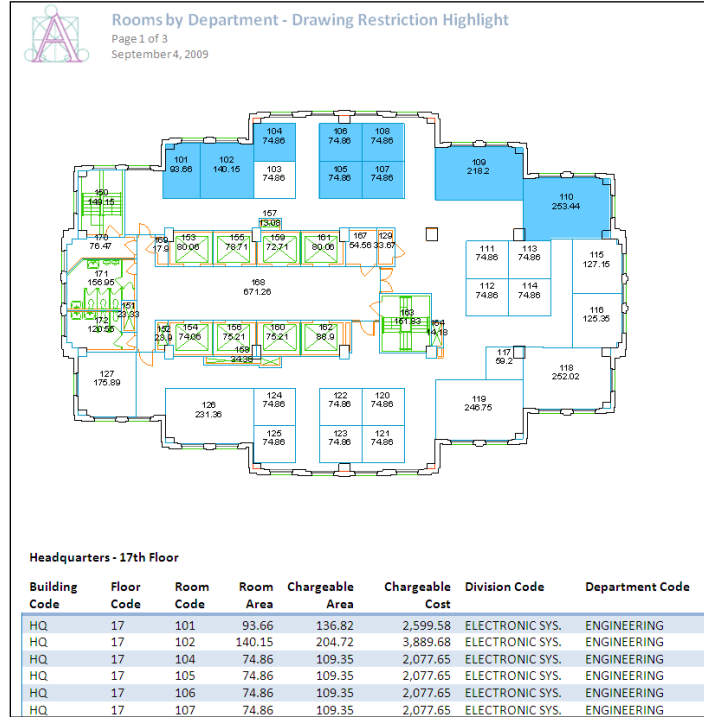
Step 4: Set Characteristics of the View

1. Type a title for the report.
2. Select fields to display from the DP table.
3. Select fields to display from the RM table.
4. Optionally, set sorts, restrictions, standards, and options.

Step 5: Preview, View, and Publish

Exercise 8216: Create a Paginated Report with Drawing Restriction

Management would like to encourage departments to use space more frugally. Management realizes that space costs money, so it decides it needs a report showing each department's share of office space and its equivalent cost. Please design a graphical report of "Room Areas by Department" that management can pass out to each department head.



Step 1: Select the Type of View

1. Select "A Paginated Report" since this view will contain large numbers of records and floor plans.

Step 2: Select the View's Pattern

1. Select "A paginated report with highlighted drawings" in order to view departmental totals as well as details on the rooms belonging to each department.

Step 3: Select the Tables to Include

1. Select RM for the rooms data displayed for each floor.

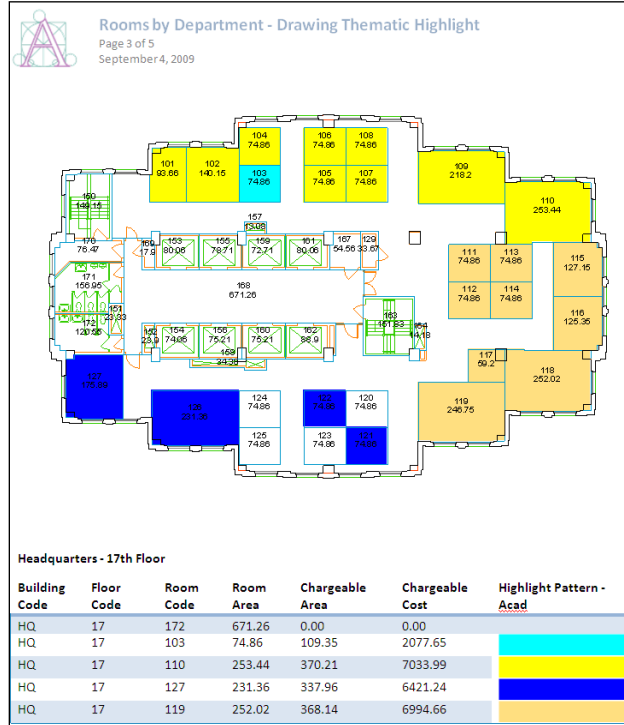
Step 4: Set Characteristics of the View

1. Type a title for the report.
2. Select fields to display from the Drawing Highlight Data for the RM table. This will set defaults.
3. Select a sort – in this case, by department.
4. Select a restriction – in this case, a restriction on a particular department.
5. Optionally, set standards, and summary and reporting options.

Step 5: Preview, View, and Publish

Exercise 8217: Create a Paginated Report with Thematic Highlighting

Management would like to encourage departments to use space more frugally. Management realizes that space costs money, so it decides it needs a report showing each department's share of office space and its equivalent cost. Please design a report of "Room Areas by Department" which shows the allocation of space graphically by floor.



Step 1: Select the Type of View

1. Select "A Paginated Report" since this view will contain large numbers of records and floor plans.

Step 2: Select the View's Pattern

1. Select "A paginated report with thematically highlighted drawings" in order to view departmental totals as well as details on the rooms belonging to each department.

Step 3: Select the Tables to Include

1. Select RM for the rooms data displayed for each floor.

Step 4: Set Characteristics of the View

1. Type a title for the report.
2. Select fields to display from the Drawing Highlight Data for the RM table. This will set defaults.
3. Select a sort – in this case, by department
4. Select a standard by which to highlight – in this case, the department highlight pattern-acad field.
5. Optionally, set restrictions, and summary and reporting options

Step 5: Preview, View, and Publish

Review Questions: View Definition Wizard

- 1.) What type of views does the View Definition create?
 - A. Charts
 - B. Graphs
 - C. Reports
 - D. Editable Forms
 - E. All of the above

- 2.) Does the View Definition Wizard allow for additional user-defined customization before saving the view?
 - A. Yes
 - B. No

- 3.) Views created with the VDW can be generated by default to which of the following formats?
 - A. Microsoft Excel
 - B. Microsoft Access
 - C. Adobe PDF
 - D. Microsoft Word

- 4.) Views created with the VDW do not have what default functionality?
 - A. Email
 - B. Print
 - C. Save as Image file (.bmp,.jpeg, etc.)
 - D. Alter and Save to Favorites

- 5.) After data tables have been chosen, what must be set to create a view?
 - A. Fields
 - B. Sort
 - C. Options
 - D. Restriction
 - E. Title

- 6.) When creating a chart, what characteristic determines whether the chart is a pie chart or a bar chart?
 - A. Fields
 - B. Sort
 - C. Options
 - D. Restriction
 - E. Title

- 7.) When creating a chart, what characteristic determines how the data will be grouped?
 - A. Fields
 - B. Sort
 - C. Options
 - D. Restriction
 - E. Title

- 8.) What file types does Step 0 allow a conversion on?
 - A. axvw
 - B. javascript
 - C. abs

Appendix: Navigation: View Definition Wizard

Contents:

- Appendix Exercises
- Review Solutions

Further Reading:

For a better understanding of the View Definition Wizard, users should research the following topics using the ARCHIBUS Help text:

- User's Guides

Review Solutions: Web Central View Definition Wizard

- 1.) What type of views does the View Definition create?
 - A. *Summary Report*
 - B. *Chart*
 - C. *Reports*
 - D. *Edit Forms*
 - E. **All of the above**

- 2.) Does the View Definition Wizard allow for additional user-defined customization before saving the view?
 - A. **Yes**
 - B. *No*

- 3.) Views created with the VDW export by default to all of the following formats, except which?
 - A. *Microsoft Excel*
 - B. **Microsoft Access**
 - C. *Adobe PDF*
 - D. *Microsoft Word*

- 4.) Views created with the VDW include the following functionality by default, except which?
 - A. *Email*
 - B. *Print*
 - C. **Save as Image file (.bmp,.jpeg, etc.)**
 - D. *Alter and Save to Favorites*

- 5.) After data tables have been chosen, what characteristic is required for creating any view?
 - A. **Fields**
 - B. *Sort*
 - C. *Options*
 - D. *Restriction*
 - E. *Title*

- 6.) When creating a chart, what characteristic determines whether the chart is a pie chart or a bar chart?
 - A. *Fields*
 - B. *Sort*
 - C. **Options**
 - D. *Restriction*
 - E. *Title*

- 7.) When creating a chart, what characteristic determines how the data will be grouped?
 - A. *Fields*
 - B. **Sort**
 - C. *Options*
 - D. *Restriction*
 - E. *Title*

- 8.) What file types does Step 0 allow a conversion on?
 - A. **axvw**
 - B. *javascript*
 - C. *abs*