Tekla EPM 2019

Start using Tekla EPM

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1 Start using Tekla EPM

Tekla EPM is a software solution designed for the needs of the steel fabrication industry. Tekla EPM brings together various modules that integrate seamlessly with each other, so the information that you enter in one Tekla EPM module is available through the entire workflow.

Tekla EPM is built upon the industry best practices. However, the operations and options in Tekla EPM can be customized to match your existing processes and procedures.

Tekla EPM consists of the following modules:

- The **Combining** module allows you to create advanced bills of materials while optimizing the use of material and minimizing the waste.
- The **Estimating** module allows you to create estimates with customizable pricing based on multiple sources for material pricing and shop-specific labor.
- The **Inventory** module allows you to track your entire inventory across all jobs as material is received and consumed. The **Inventory** module also allows you to track stock materials and non-steel items.
- The **Project Management** module allows you to easily share project information to all users that participate in a project, and create and view project schedules in order to track the progress of the project.
- The **Production Control** module allows you to view and manage the fabrication process of material items.
- The **Purchasing** module allows you to create requisitions, and automate and optimize creating and tracking purchase orders.
- The **Order Entry** module allows you to manage all tasks related to selling material from your warehouse or shop, such as creating quotes and orders, invoicing, and recording payments.

For more information, see the following links:

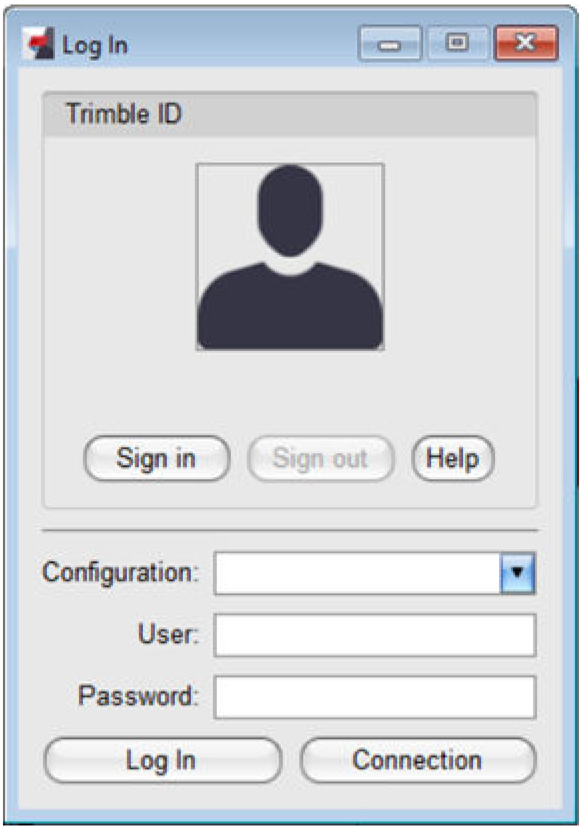
Sign in to Tekla EPM (page 6)

Set the default printer (page 12)

1.1 Sign in to Tekla EPM

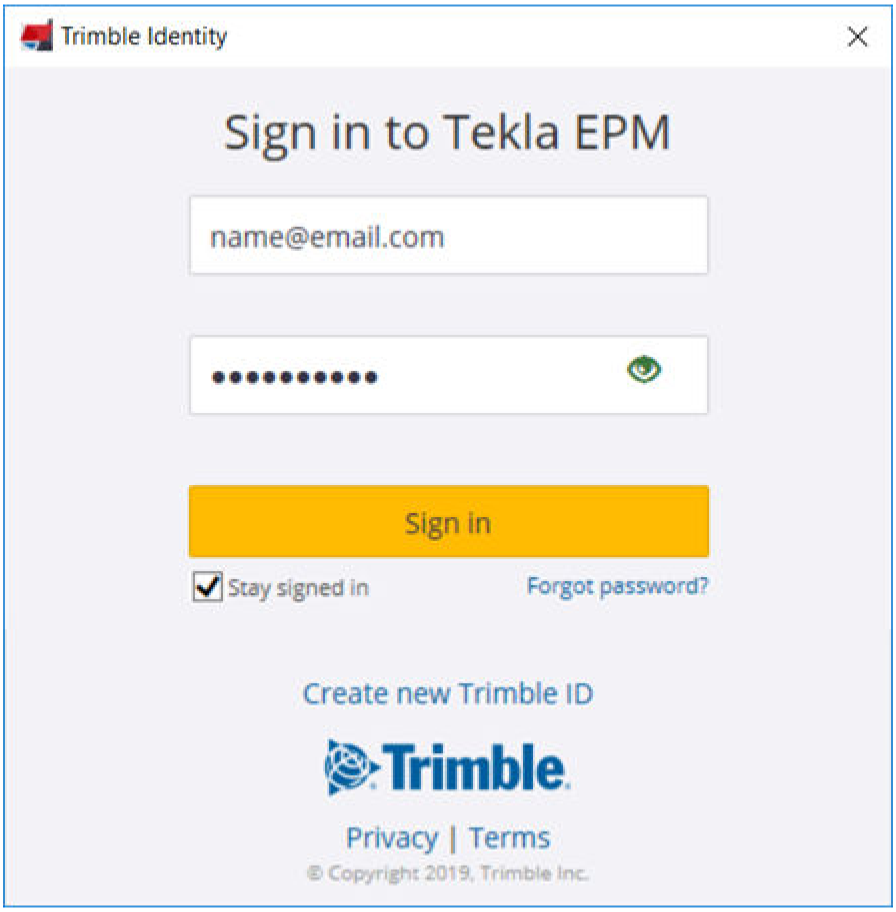
To sign in to Tekla EPM for the first time, do the following:

1. Start Tekla EPM.



2. In the **Trimble ID** section of the **Log In** dialog box, click **Sign in**.

If you do not have a Trimble Identity, see Create your Trimble Identity (page 8).



3. In the **Trimble Identity** dialog box, type your email address and password.
4. If you want to stay signed in with this Trimble Identity, select the **Stay signed in** check box.
5. Click **Sign in**.

   The **Trimble Identity** dialog box closes automatically.
6. If necessary, in the **Configuration** list of the **Log In** dialog box, select which configuration of Tekla EPM you want to use.

   Note that you only need to select a configuration if you have purchased more than one configuration of Tekla EPM.
7. Type your Tekla EPM username and password.

   The username and password need to be created by an administrator in your company.

   If you have previously used Fabsuite, your username and password are the same as in Fabsuite.

8. Click **Log In**.
9. In the **Enter Value** dialog box, do either of the following:
    - To save your Trimble Identity and use it automatically when you sign in to Tekla EPM, select **Yes** in the list.
    - To not use your Trimble Identity automatically when you log in, select **No** in the list.

See also

Tekla EPM configurations (page 8)
Create your Trimble Identity (page 8)
The Tekla EPM window (page 9)
Set or change your Tekla EPM password (page 10)
Access the Tekla EPM manuals (page 11)

Tekla EPM configurations

Tekla EPM is available in different configurations that provide the opportunity to use different Tekla EPM modules and features.

The Tekla EPM modules included in different configurations are:

Name	Tekla EPM Full	Tekla EPM Production
Combining	✔	✔
Estimating	✔	
Inventory	✔	✔
Project Management	✔	✔
Production Control	✔	✔
Purchasing	✔	✔
Order Entry	✔	✔

In addition to the Tekla EPM configurations in the table, there are specific Tekla EPM configurations that replace the Fabsuite configurations used by former Fabsuite customers.

Create your Trimble Identity

You need a Trimble Identity to download and use Tekla EPM.

The licenses of each Tekla EPM user are tied to the user's Trimble Identity. For this reason, users always need to sign in to Tekla EPM with their Trimble

Identity. In addition, each Tekla EPM user needs to be added to the company's organization by a user with administrator rights.

If you are the named contact at your organization, Trimble automatically creates an account for you or connects your existing Trimble Identity to your organization. The named contact has administrator status and must add other users into the organization to enable their access to content and services that require a valid maintenance contract.

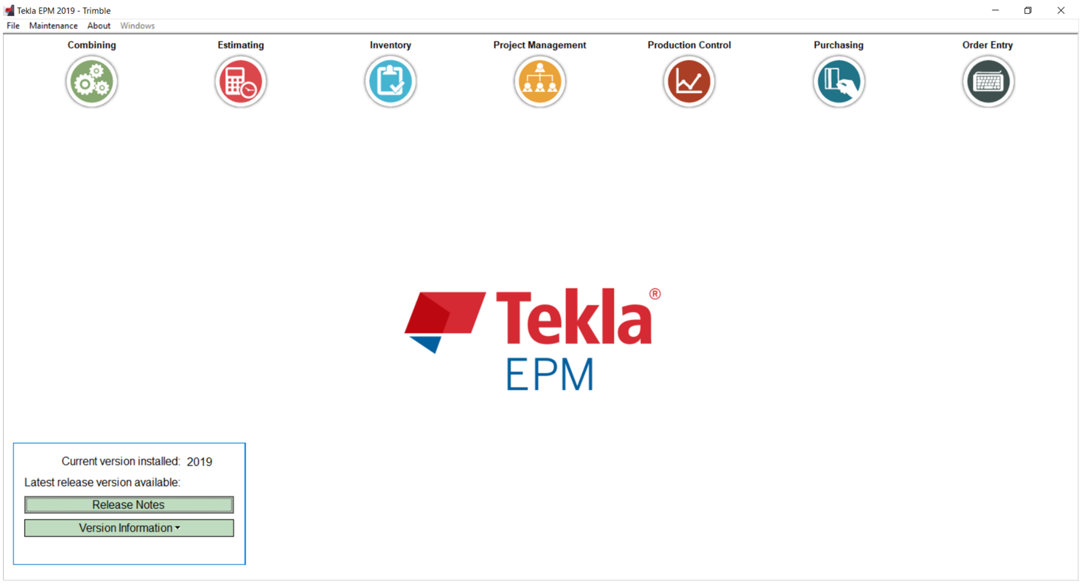
If you are the named contact, Trimble sends you an email with an invitation to accept membership in the organization group and complete the profile information if you did not have an existing Trimble Identity. You are then responsible for managing the organization group together with other administrators that you assign.

If you are not the named contact, you receive an email invitation to join the organization group when an administrator from your own organization invites you. You can also create a new Trimble Identity here.

If you are having problems using your Trimble Identity in Tekla Online services, see the troubleshooting information on this page.

The Tekla EPM window

See the elements of the Tekla EPM window in the following image:



- The **File** menu contains all administrative commands.
- The **Maintenance** menu allows you to adjust the settings of all Tekla EPM modules and jobs.
- The **About** menu allows you to access the Tekla EPM manuals and release notes.

- The **Windows** menu lists all your open Tekla EPM dialog boxes.

  You can select a dialog box in the menu to open it on top of other dialog boxes.
- A contextual menu is available when working in any Tekla EPM module.

  When you open a Tekla EPM module, the related contextual ribbon tab appears on the right side of the other ribbon tabs.

  By clicking the contextual ribbon tab, you can access the commands in the contextual menu. Any commands that you click in the contextual menu only affect the job that is currently open.
- The buttons at the top of the Tekla EPM window represent the various Tekla EPM modules.

  You can access a module by clicking the desired button.

  If you do not have rights to access a module, the module button appears gray and cannot be selected.

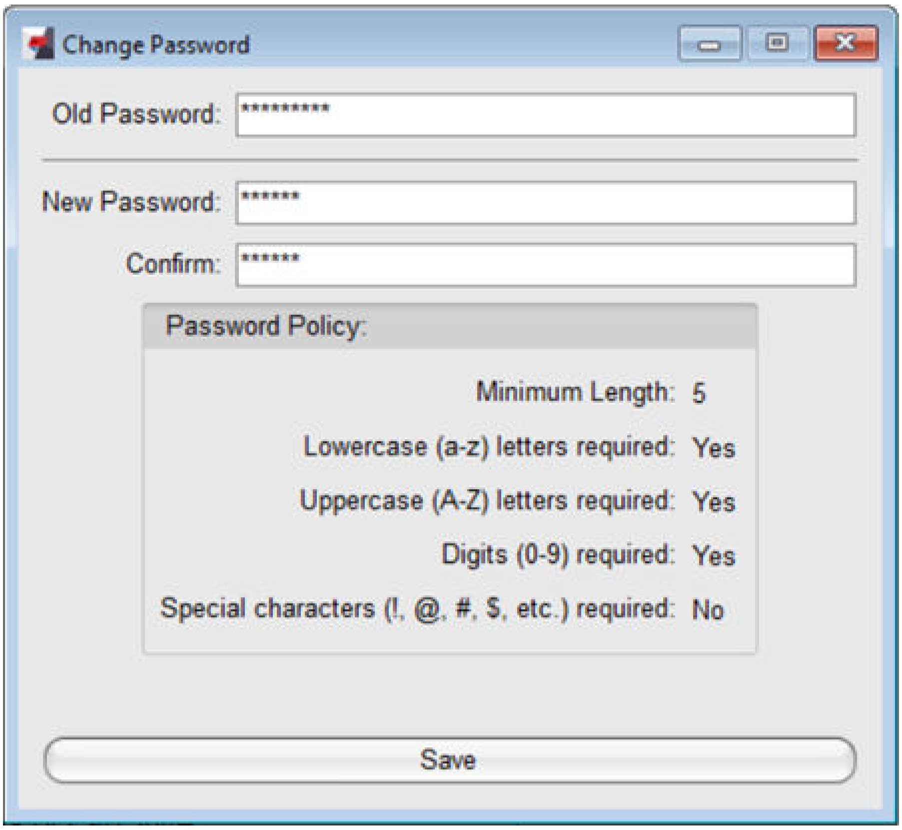
Set or change your Tekla EPM password

Use the **Change Password** command to either create the password you will use when you log in to Tekla EPM, or change your current password.

Note that passwords are case-sensitive.

If your initial password does not meet the company password policy, the **Change Password** dialog box opens automatically when you first log in to Tekla EPM.

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Change Password**.



3. In the **Change Password** dialog box, type your old password in the **Old Password** field.

   If you are setting your password for the first time, leave the **Old Password** field blank.

4. Type your new password in the **New Password** and **Confirm** fields.

   The passwords in the **New Password** and **Confirm** fields need to be identical.

   You can verify your company's requirements for the password in the **Password Policy** section of the dialog box. The password policy is set by the Tekla EPM administrators of your company.

5. Click **Save** to update the password.

   A message appears, telling you that the password has been changed.

6. Click **OK** to close the message.

Access the Tekla EPM manuals

To access the Tekla EPM manuals as PDF files directly from Tekla EPM, do the following:

1. Click the **About** ribbon tab at the top of the Tekla EPM window.

2. In the **About** dialog box, click the arrow on the right side of the **Open User Manual** list.
3. In the list, select the manual that you want to open.

The selected manual opens in your default PDF viewer.

1.2 Set the default printer

You can set or change the default printer for the current workstation. Setting a default printer for a workstation is optional.

1. Click the **Administration** ribbon tab.
2. In the **File** menu, select **Default Printer**.
3. To select or change the default printer, in the dialog box, click **Change**.
4. In the **Select Printer** dialog box, click a printer to select it.
5. Click **OK**.
6. To confirm using the selected printer as the default printer, in the **Default Printer** dialog box, click **OK**.

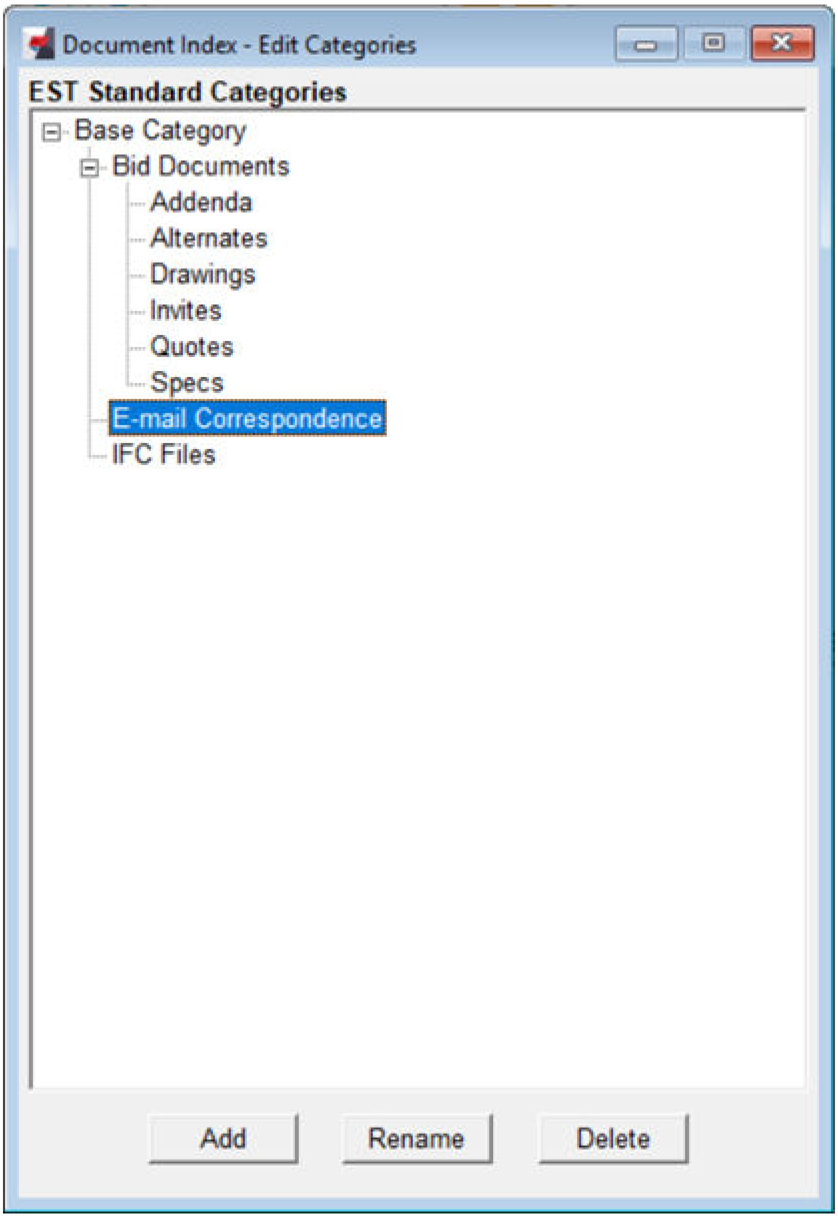
1.3 Set the standard categories for attached documents

Document Index in Tekla EPM allows you to organize and save documents for a job in the **Combining**, **Estimating**, **Order Entry**, **Project Management**, **Production Control**, and **Purchasing** modules. The standard categories where you can organize documents need to be set separately for each module.

1. Click the **Maintenance** ribbon tab.
2. In the menu, go to **Document Index**, and select any of the following:
    - **Standard Categories - CMB**: set the categories for organizing documents related to combining jobs.
    - **Standard Categories - EST**: set the categories for organizing documents related to estimating jobs.
    - **Standard Categories - ORD**: set the categories for organizing documents related to customer orders.
    - **Standard Categories - PRJ**: set the categories for organizing documents related to project management jobs.
    - **Standard Categories - PDC**: set the categories for organizing documents related to production control jobs.

- **Standard Categories - REQ**: set the categories for organizing documents related to requisitions.
- **Standard Categories - PO**: set the categories for organizing documents related to purchase orders.

The **Document Index - Edit Categories** dialog box opens.



Add a category

1. In the **Document Index - Edit Categories** dialog box, select the category under which you want to create the new category.

2. At the bottom of the dialog box, click **New**.
3. In the **New Category** dialog box, type a name for the category.
4. Click **OK** to add the category.

Rename a category

1. In the **Document Index - Edit Categories** dialog box, select the category that you want to rename.
2. Click **Rename**.
3. In the **New Category** dialog box, type a new name for the category.
4. Click **OK** to update the name.

Delete a category

Note that deleting a category is permanent and cannot be undone.

1. In the **Document Index - Edit Categories** dialog box, select the category that you want to delete.
2. Click **Delete**.
3. To permanently delete the category, click **Yes** in the confirmation dialog box.

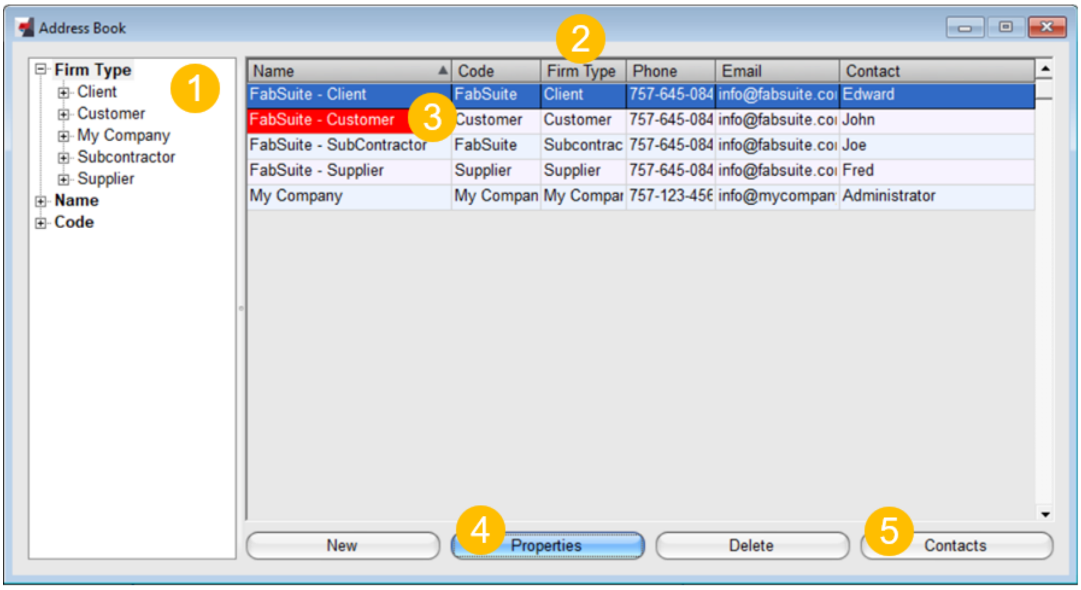
1.4 Manage the address book

Use the **Address Book** to define and manage the companies and contacts used in all Tekla EPM modules. We recommend that you set up the address book as early as possible, so that working in Tekla EPM becomes more fluent and efficient.

To access the **Address Book**, do the following:

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Address Book**.

The **Address Book** dialog box opens.



The main components of the **Address Book** dialog box are:

(1) The navigation tree: allows you to only view specific companies.

Click **+** to expand and select options in the navigation tree. When you select an option, only companies that match the selected option are displayed.

For example, you can expand **Firm Type** and select **Supplier** to only display suppliers.

(2) The firm type: tells Tekla EPM where the company information should be used.

For more information, see View firm types (page 16).

(3) Red cells: indicate companies that are over their assigned credit limit.

(4) The **Properties** button: allows you to view the current company properties and credit settings and modify them.

(5) The **Contacts** button: allows you to switch to a view where the contact persons of the companies are displayed.

Note that you can customize the layout of the **Address Book** dialog box. For more information, see Customize the layout of a dialog box (page 48).

For more information, see the following links:

Find companies or contacts (page 16)

View firm types (page 16)

Add companies to the address book (page 17)

Add new contacts to the address book (page 18)

Modify company or contact properties (page 19)

Import Microsoft Outlook contacts (page 19)

Import vendors or customers from Timberline or Sage 300 CRE (page 20)

Export companies or contacts (page 21)

Delete companies or contacts from the address book (page 21)

Find companies or contacts

You can use the **Find Company** and **Find Contact** commands to quickly find and select the correct company or contact in the **Address Book** dialog box.

Find companies

1. In the **Address Book** dialog box, click the **Address Book** ribbon tab.
2. In the menu, select **Find Company**.
3. Select if you want to search companies by name or by company code.
4. Type the company name or company code in the empty field, or click the arrow on the right side of the field and select the company in the list.
5. Click **OK**.

The company is selected in the **Address Book** dialog box.

Find contacts

1. In the **Address Book - Contacts** dialog box, click the **Address Book Contacts** ribbon tab.
2. In the menu, select **Find Contact**.
3. Type the contact name in the empty field, or click the arrow on the right side of the field and select the contact in the list.
4. Click **OK**.

The contact is selected in the **Address Book - Contacts** dialog box.

View firm types

The various firm types in the address book are used in different modules in Tekla EPM. Use the **Firm Types** command to quickly view the different firm types and where they can be used.

1. While in the **Address Book** dialog box, click the **Address Book** ribbon tab.
2. In the menu, select **Firm Types**.
3. In the **Firm Types** dialog box, review the firm types and where they can used in Tekla EPM.

4. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

Add companies to the address book

To add new companies to the address book and define their properties, do the following:

1. At the bottom left corner of the **Address Book** dialog box, click **New**.
2. On the **General** of the **Firm Details** dialog box, select a suitable firm type in the **Firm Type** list.

   Firm types help Tekla EPM to sort the list of companies in the address book. For more information, see View firm types (page 16).

   TIP You can add more than one firm type for a company. For example, a steel detailer can be added as both a detailer for **Project Management** and as a supplier for purchase orders.

   ---

3. Type a name and a code for the company.

   The company code can be any value. For example, you can use the accounting code of the company.

   Note that you cannot use the same company code for two companies that have the same firm type.

4. Select a primary currency type for the company.
5. If necessary, modify the credit limit of the company, and add any additional notes regarding the company.
6. Open the **Addresses** tab.
7. Click **New Address**.
8. Type a description for the address and enter other necessary contact information.

   Sometimes, it might be useful to have multiple addresses for a client. For example, if a client has different production control jobs, they can have multiple jobsite addresses that you should ship materials to. In these situations, you can use the jobsite names or job numbers as the descriptions of the jobsite addresses.

   Remember to add the jobsite contacts on the **Contacts** tab. For more information, see Add new contacts to the address book (page 18).

9. Select one of the available check boxes to define if the address is a shipping or mailing address.

10. Select the **Active** check box.

    If you do not select the **Active** check box, the address will not be available for use anywhere in Tekla EPM.

11. Click **Save Address**.
12. On the **Contacts** tab, add contacts for the company.

    For more information, see Add new contacts to the address book (page 18).

13. Click **Save**.

The **Firm Details** dialog box closes. The new company is saved to the address book.

See also

Modify company or contact properties (page 19)

Add new contacts to the address book

You can add new contact persons either when adding or modifying company properties, or in the **Address Book - Contacts** dialog box. You can also view all existing contacts by clicking the **Contacts** tab at the bottom of the **Address Book** dialog box.

You can also import contacts to the address book. For more information, see Import Microsoft Outlook contacts (page 19) and Import vendors or customers from Timberline or Sage 300 CRE (page 20).

Add a new contact person in the company properties

1. In the **Firm Details** dialog box, go to the **Contacts** tab.
2. Click **New Contact**.
3. Type the name and contact information of the new contact person.
4. If the contact person is an inspector, select the **Inspector** check box and add an inspector ID.
5. Select the **Active** check box.

    If you do not select the **Active** check box, you cannot select the contact person anywhere in Tekla EPM.

6. To save the contact person and add the contact person to the list of contacts, click **Add Contact**.
7. In the **Default Contact** list, select a default contact person for the company.

8. Click **Save**.

   The **Firm Details** dialog box closes.

Add a new contact person in the contact list

1. At the bottom of the **Address Book**, click **Contacts**.
2. In the lower-left corner of the **Address Book - Contacts** dialog box, click **New**.
3. In the **Contact Details** dialog box, select the firm type and company for the new contact person.

   For more information on firm types, see View firm types (page 16).
4. Type the contact person's name and contact information.
5. If the contact person is an inspector, select the **Inspector** check box and add an inspector ID.
6. Select the **Active** check box.

   If you do not select the **Active** check box, you cannot select the contact person anywhere in Tekla EPM.
7. Click **Save**.

The **Contact Details** dialog box closes. The new contact person is added to the list of contacts.

Modify company or contact properties

You can modify the properties of existing companies and contacts in the **Address Book** dialog box. For example, this can be useful when you need to update phone numbers, or shipping and mailing addresses.

1. At the bottom of the **Address Book** dialog box, click **Properties**.

   The **General** tab of the **Firm Details** dialog box opens.
2. On the various tabs, modify the company properties according to your needs.

   For example, you can change the firm type or company code, update the addresses saved for the company, or create new contacts.
3. Click **Save**.

The company and contact details are updated, and the **Firm Details** dialog box closes.

Import Microsoft Outlook contacts

If necessary, you can import the contacts in your Microsoft Outlook address book to Tekla EPM. You can either import all contacts at once, or select which contacts you want to use in Tekla EPM.

Before you import contacts from Microsoft Outlook, verify that the contacts are listed with the companies in the manner that you want them to appear in Tekla EPM.

1. In the **Address Book** dialog box, click the **Address Book** ribbon tab.
2. In the menu, select **Import Outlook Contacts**.

   The **Select Contacts to Import** dialog box opens.

   Tekla EPM reads the list of contacts in Microsoft Outlook, and the contacts appear on the **Included** side of the dialog box.
3. On the left-hand pane, select the contacts folder from which you want to import contacts.
4. If you want to include the contacts in the sub-folders of the selected folder, ensure that the **Include Sub-Folder Contacts** check box is selected.
5. Click the arrow buttons to move the contacts that you want to import to the **Included** list.
6. Click **Save**.

The selected Microsoft Outlook contacts are imported to the address book in Tekla EPM. The **Import Outlook Contacts** closes.

See also

Add new contacts to the address book (page 18)

Import vendors or customers from Timberline or Sage 300 CRE (page 20)

Import vendors or customers from Timberline or Sage 300 CRE

If you are using the Timberline accounting software or Sage 300 CRE, you can easily import the existing contacts from Timberline or Sage 300 CRE to Tekla EPM.

1. In the **Address Book** dialog box, click the **Address Book** ribbon tab.
2. In the menu, select **Timberline / Sage 300 CRE**.
3. According to your needs, select either **Import Customers** or **Import Vendors**.

The current customers or vendors are imported to Tekla EPM.

See also

Add new contacts to the address book (page 18)

Import Microsoft Outlook contacts (page 19)

Export companies or contacts

You can export the current list of companies or contacts in the **Address Book** and save the list as a Microsoft Excel worksheet or a text file.

1. In the **Address Book** dialog box, click the **Address Book** ribbon tab.
2. In the menu, select either **Export Firms** or **Export Contacts**.
3. In the **Save As** dialog box, browse to the folder where you want to save the file.

   By default, Tekla EPM saves the file to the **Export** folder.
4. If necessary, modify the file name.
5. If necessary, select another file format in the **Save as type** list.
6. Click **Save**.

The list of companies or contacts is exported and saved to the selected location.

Delete companies or contacts from the address book

To keep the address book up to date, you may need to delete unnecessary and outdated companies and contacts.

1. Do one of the following according to your needs:
   - To delete a company, select the company in the **Address Book** dialog box.
   - To delete a contact, select the contact in the **Address Book - Contacts** dialog box.
2. Click **Delete** in the lower-right corner of the dialog box.
3. To permanently delete the company or contact from the address book, click **Yes** in the confirmation dialog box.

1.5 Manage taxes and currencies

Before you start working in Tekla EPM, you should set the necessary tax rates and currencies. You can also create tax groups that contain multiple tax rates.

For more information, see the following links:

Create, modify, or delete tax rates (page 22)

Create, modify, or delete tax groups (page 23)

Add, modify, or delete currencies (page 24)

Create, modify, or delete tax rates

Use the **Tax Rates** dialog box to define all individual taxes used in your projects. For example, the state sales tax may consists of a city tax rate and a county tax rate, and you should enter each tax rate separately. If necessary, you can group the associated tax rates into tax groups. In addition to adding tax rates, you can modify and delete existing tax rates.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Tax Rates**.
3. In the **Tax Rate Maintenance** dialog box, do any of the following:

To	Do this
Add a new tax rate	a. Click **New**. b. In the **Abbreviation** field, type an abbreviation code. The abbreviation code is visible in lists where you can select the tax rate to be applied. c. In the **Description** field, type a description for the tax rate. d. Define the state, county, city, and tax rate. e. In the **Tax Rate Applies To** section, select what the tax rate is applied to. You can also define an up to amount and select whether the tax rate is cascading. f. To save the new tax rate, click **Add**.
Modify a tax rate	a. Select the tax rate that you want to modify. b. Modify the abbreviation, description, state, county, city, and tax rate according to your needs. c. In the **Tax Rate Applies To** section, select what the tax rate is applied to. You can also define an up to amount and select whether the tax rate is cascading. d. Click **Edit** to save the changes.

To	Do this
Delete a tax rate	Note that you cannot delete tax rates that are used somewhere in Tekla EPM. a. Select the tax rate that you want to delete. b. Click **Delete**. c. To permanently delete tax rate, click **Yes**.

4. When you are finished, do either of the following according to your needs:
    - To close the dialog box, click the **Close** button (**X**) in the upper-right corner.
    - To group the existing tax rates, click **Tax Group Maintenance** at the lower-right corner of the dialog box.

See also

Create, modify, or delete tax groups (page 23)

Create, modify, or delete tax groups

Creating tax groups that contain multiple tax rates can be helpful for record keeping. For example, city, county, and state tax rates can be combined into one group. Tax groups are available in the **Purchasing** and **Order Entry** modules. Creating tax groups is optional, so if you wish, you can define and use single tax rates instead.

1. To access **Tax Group Maintenance**, do one of the following:
    - Click the **Maintenance** ribbon tab and in the menu, select **Tax Groups**.
    - At the bottom right corner of the **Tax Rate Maintenance** dialog box, click **Tax Group Maintenance**.
2. In the **Tax Group Maintenance** dialog box, do any of the following:

To	Do this
Create a new tax group	a. Click **New**. b. In the **Abbreviation** field, type an abbreviation code. The abbreviation code will be used in lists where you can select the tax group. c. In the **Description** field, type a description for the tax group. d. If necessary, type the state, country, or city that the tax group applies to.

To	Do this
	e. Click **Add** to save the tax group and add it to the list. The new tax group is automatically selected. f. To select the tax rates that you want to add to the tax group, click **Included Tax Rates**. g. Click the arrow buttons to move the tax rates that you want to include in the tax group to the **Included** list. h. Click **OK**. The selected tax rates are added to the selected tax group.
Modify a tax group	a. Select a tax group in the list. b. Modify the abbreviation, description, state, county, and city according to your needs. c. If necessary, click **Included Tax Rates** to modify the tax rates included in the tax group. d. Click the arrow buttons to move the tax rates that you want to include in the tax group to the **Included** list. e. Click **Edit** to save the changes.
Delete tax groups	Note that you cannot delete tax groups that are used somewhere in Tekla EPM. a. Select a tax group in the list. b. Click **Delete**. c. To permanently delete tax group, click **Yes** in the confirmation dialog box.

3. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

See also

Create, modify, or delete tax rates (page 22)

Add, modify, or delete currencies

In the **Currencies** dialog box, you can add currencies that you need to use in Tekla EPM. You can also set the default currency, modify or delete existing currencies, and modify exchange rates.

To manage the available currencies, do the following:

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Currencies**.

The **Currencies** dialog box opens.

Add a currency

1. In the **Currencies** dialog box, click **New**.
2. Define the currency properties:

Option	Description
Abbreviation	The abbreviation of the currency. For example, `EUR` is the abbreviation for euros. The abbreviation is used in lists where you need to select a currency. Type the abbreviation in the **Abbreviation** field.
Description	The currency name. For example, `Euros`. Type the currency name in the **Description** field.
Display Prefix	The currency code or symbol that is displayed before the sum. Type the currency code in the **Display Prefix** field.
Display Suffix	The currency code or symbol that is displayed after the sum. Type the currency code in the **Display Suffix** field.
Decimal Places	The number of decimal places in the currency. Type the number in the **Decimal Places** field.

3. If you want to make the new currency the default currency option, select the **Default Currency** check box.
4. Click **Add**.

The new currency is added to the list.

Now, you can modify the exchange rate of the new currency to other currencies.

Modify an exchange rate

1. In the **Currencies** dialog box, select the currency whose exchange rates you want to modify.

   The exchange rates of the selected currency are displayed in the lower-right corner of the dialog box.

2. Double-click the exchange rate that you want to modify.
3. In the **Currency Exchange Rate** dialog box, define the exchange rates from and to the selected currency.

   You can also only define the first exhange rate and automatically calculate the second one by selecting the **Calculate Inverse** check box.

4. Click **Save**.

Repeat steps 1 to 5 for all necessary exchange rates.

Set the default currency

By default, the default currency in Tekla EPM is US dollars. However, you can change the default currency according to your needs.

1. In the **Currencies** dialog box, select the currency that you want to set as the default option.
2. Select the **Default Currency** check box.
3. Click **Edit** to save the changes.

The selected currency is set as the default option.

Note that the **Default Currency** column of the selected currency now says **Yes**.

Modify a currency

1. In the **Currencies** dialog box, select the currency that you want to modify.
2. Modify the currency properties according to your needs:

Option	Description
Abbreviation	The abbreviation of the currency. For example, `EUR` is the abbreviation for euros. The abbreviation is used in lists where you need to select a currency. Type the abbreviation in the **Abbreviation** field.
Description	The currency name. For example, `Euros`. Type the currency name in the **Description** field.

Option	Description
Display Prefix	The currency code or symbol that is displayed before the sum. Type the currency code in the **Display Prefix** field.
Display Suffix	The currency code or symbol that is displayed after the sum. Type the currency code in the **Display Suffix** field.
Decimal Places	The number of decimals in the currency. Type the number in the **Decimal Places** field.

3. Click **Edit** to save the changes..

Delete a currency

Note that deleting a currency is permanent and cannot be undone.

You cannot delete currencies that are currently used somewhere in Tekla EPM.

1. In the **Currencies** dialog box, select the currency that you want to delete.
2. Click **Delete**.
3. To permanently delete the selected currency, click **Yes** in the confirmation dialog box.

1.6 Import files to Tekla EPM

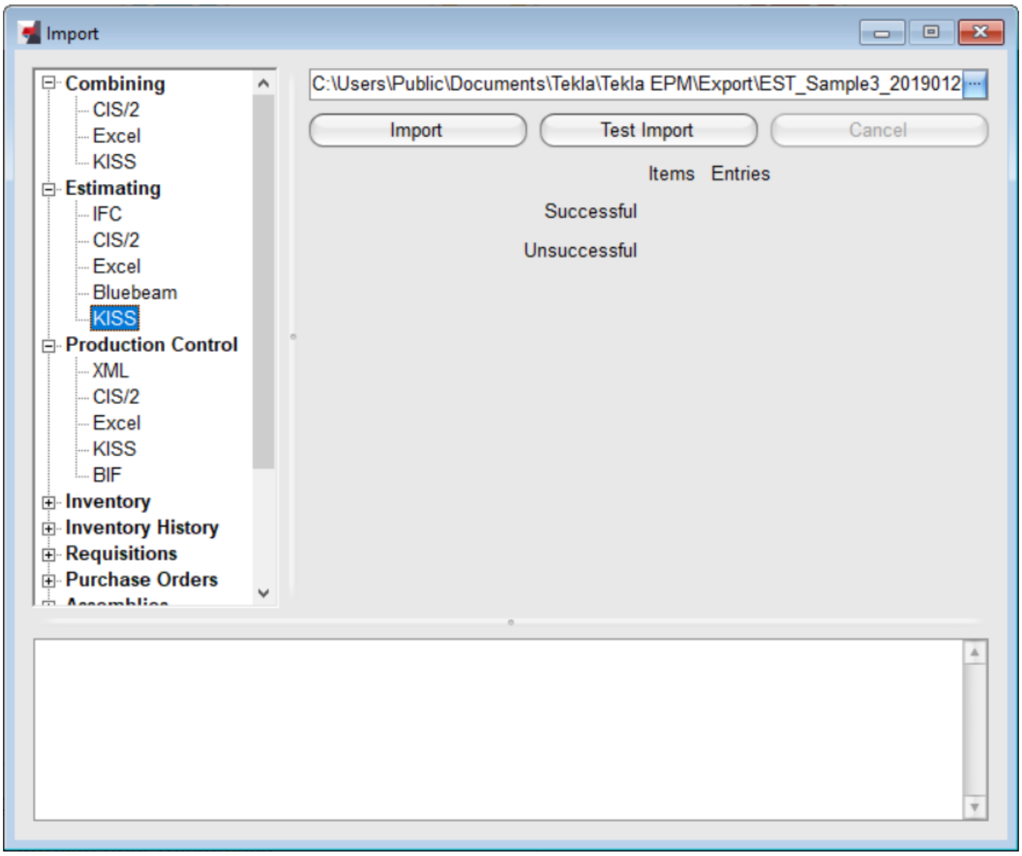
You can import various types of files to Tekla EPM. You can import various types of information, including jobs, requisitions, purchase orders, companies or contacts to the address book, inventory or inventory history information, assemblies, material dimensions, labor, and pricing information.

You can import the following file types:

- Microsoft Excel worksheets
- KISS files
- CIS/2 files
- XML files
- BIF files
- SSC files
- ASCII files
- txt files

Note that the file types that you can import depend on the location and module where you are importing them.

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Import**.



3. In the navigation tree on the left side of the **Import** dialog box, select the location where you want to import a file.
4. Below the location, select the file type that you want to import.

   If a file type is not available below the selected location, you cannot import that type of file to the selected location.
5. Click the **...** button.
6. In the **Open** dialog box, browse to find the file that you want to import, and select it.
7. Double-click the file, or click **Open**.
8. To import the file, click **Import**.

   Some import locations have a **Test Import** button. By clicking **Test Import**, you can ensure that all information will be imported successfully.

   What happens next depends on the imported file and the information within it. You may need to translate shapes and grades, modify the job information, or select if the new information replaces the information in an existing job.

If any import errors occur, you can see the error details at the bottom of the **Import** dialog box.

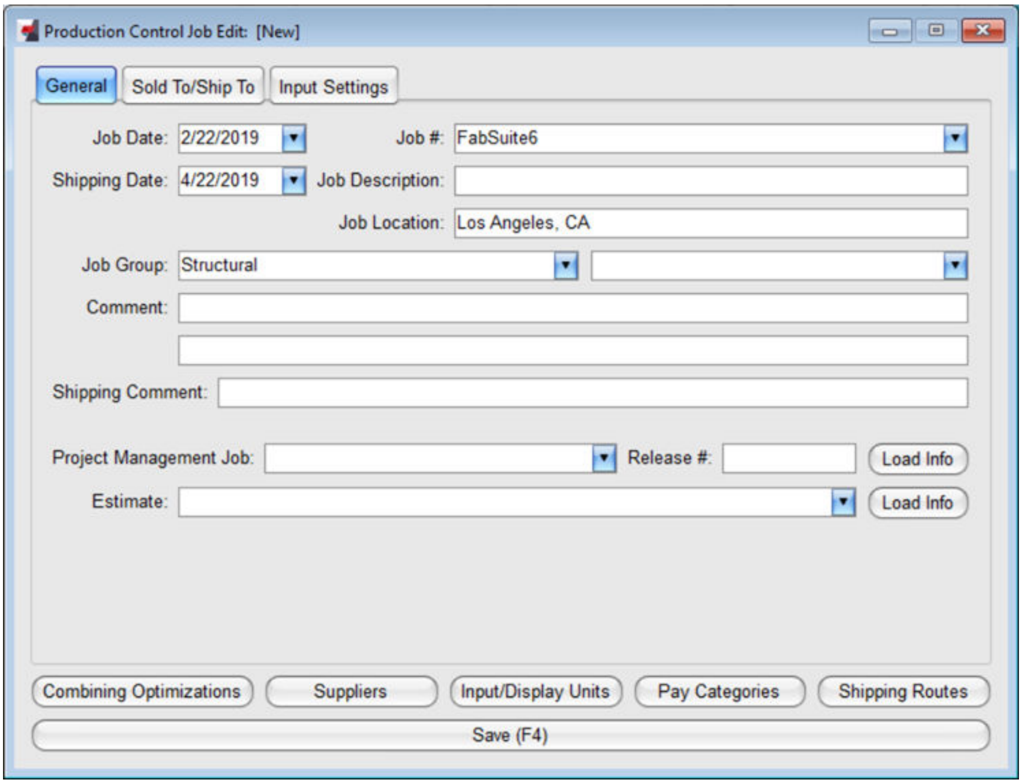
```
-IMPORT ERROR-The Item Already Exists- E, 10, , H, 0, 0, 0, USD, 0, USD, 0, /Item, , , Columns, , , , 0,
USD, 0, 0, USD, 0, 100C1-100C1, , , F, , ,
-IMPORT ERROR-The Item Already Exists- E, 20, , A, 0, 0, 0, USD, 0, USD, 0, /Item, , , , , , , 0, USD, 0, 0,
USD, 0, 100C1-p7, , , F, , ,
-IMPORT ERROR-The Item Already Exists- E, 30, , A, 0, 0, 0, USD, 0, USD, 0, /Item, , , , , , , 0, USD, 0, 0,
USD, 0, 100C1-p48, , , F, , ,
-IMPORT ERROR-The Item Already Exists- E, 40, , H, , , , USD, 0, USD, 0, /Item, , , Columns, , , , , USD, 0,
, USD, 0, , , , F, , ,
-IMPORT ERROR-The Item Already Exists- E, 50, , A, 0, 0, 0, USD, 0, USD, 0, /Item, , , , , , , 0, USD, 0, 0,
USD, 0, 101C1-p12, , , F, , ,

Import Completed: 2/22/2019 8:07:26.90

0 Successful Items
33 Successful Entries
5 Unsuccessful Items
5 Unsuccessful Entries
```

See the following example about importing a production control job.

Example: Import a new production control job

1. Open the **Import** dialog box.
2. In the navigation tree, select **Production Control** --> **KISS** .
3. Click **Import**.
4. In the **Production Control Job Edit**, type the job number and define other necessary job information.

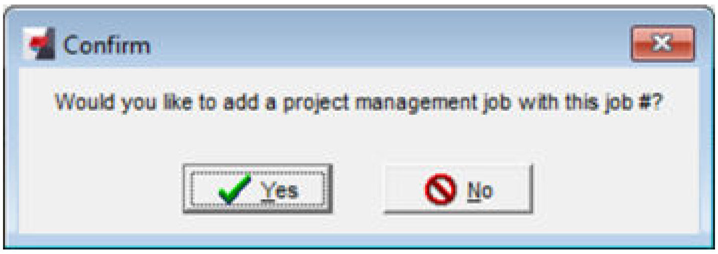
   If you want to import drawings along with the production control job, you can either select an existing job in the **Project Management Job** list, or create a new project management job in step 6.



5. Click **Save**.
6. If you want to create a related project management job with the same job number, click **Yes** in the confirmation dialog box.

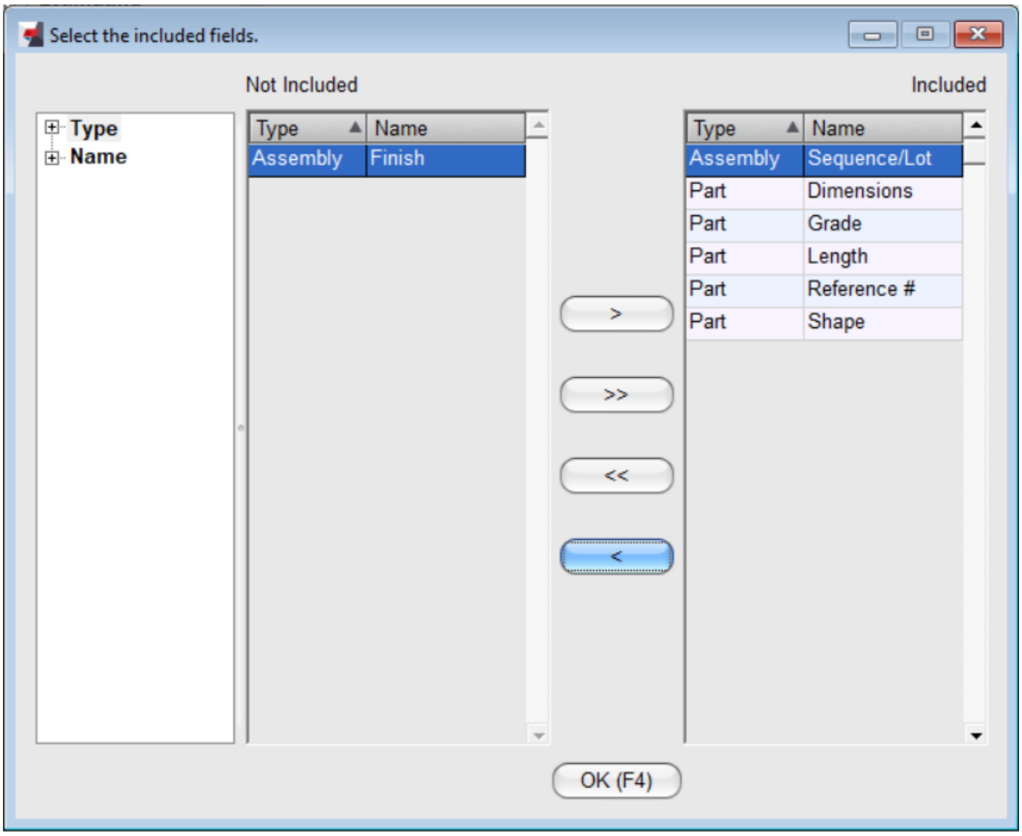
   If you do not want to create a related project management job, click **No**.

   If you do not create or link a related project management job to the imported production control job, you will not be able to import any related drawings.



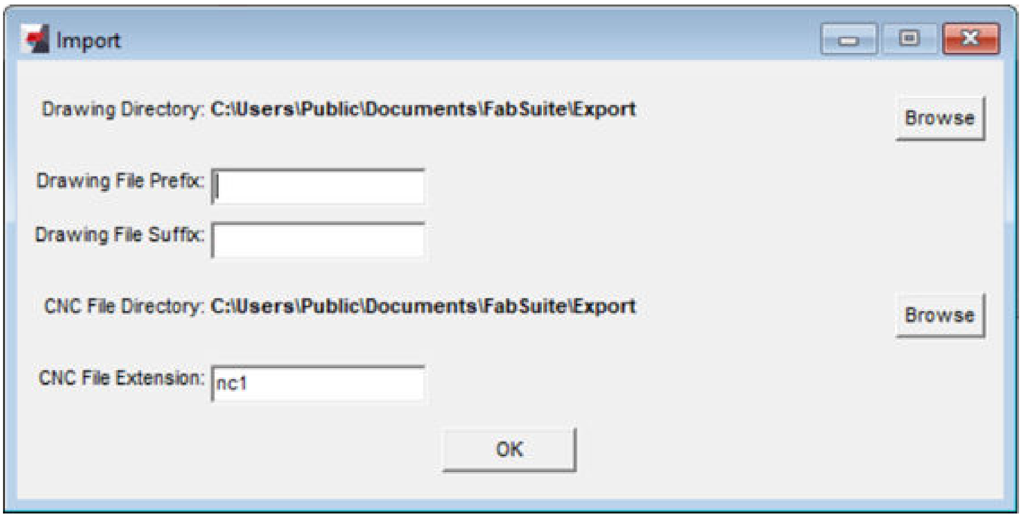
   If you have selected the **Prompt to confirm import fields** option in the **Company Standards** dialog box the **Production Control** module, a dialog box opens, allowing you to select the information that is imported.

7. Click the arrow buttons to move the information that you want to import to the production control job to the **Included** list.



8. Click **OK**.

9. In the **Import** dialog box, select the drawing folder and CNC file folder, and define the drawing file prefix and suffix, and the CNC file extension.



If you did not create or link a related project management job to the imported production control job, drawings cannot be imported.

10. Click **OK**.

The import begins. Tekla EPM alerts you if any files, such as drawings, are missing.

You can see the number of the successfully and unsuccessfully imported items in the **Import** dialog box.

See also

Import assemblies and parametric assemblies (page 32)

Translate unknown shapes and grades (page 32)

Import assemblies and parametric assemblies

Besides labor time, you can also import assemblies and parametric assemblies. To be imported, the assemblies and parametric assemblies need to be saved as text files. You can use the imported assemblies and parametric assemblies in any estimating job.

1. Click the **File** ribbon tab in the upper-left corner of the Tekla EPM window.
2. In the **File** menu, select **Import**.
3. In the navigation tree on the left side of the **Import** dialog box, select one of the following depending on the assembly type:
   - **Assemblies** --> **Assemblies**
   - **Assemblies** --> **Parametric Assemblies**
4. Click the **...** button.
5. In the **Open** dialog box, browse to find the text file that you want to import.
6. Select the file and click **Open**.
7. Click **Import**.
8. View the status of the import process.

   If necessary, you can view the import details and errors in a text file by clicking the **Open Import Log** button.
9. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

Translate unknown shapes and grades

When you are importing files, such as drawings, to Tekla EPM, sometimes the shapes and grades in the imported files do not match the shapes and grades in Tekla EPM. In these cases, Tekla EPM does not recognize the shapes and grades. To solve the issue, you need to create an item association that allows Tekla EPM to identify the shapes and grades.

We recommend that your administrator sends a list of shapes and grades used in Tekla EPM to the detailers, so that you can ensure that the same abbreviations are used in the shop detail drawing bill of materials.

If you need to create an item association during the import process, the **Translate Shapes/Grades** dialog box opens automatically.

1. In the **Translate Shapes/Grades** dialog box, select the item that needs to be translated.
2. Click the arrow on the right side of the **New Shape** list, and select the shape abbreviation used in Tekla EPM.
3. If necessary, click the arrow on the right side of the **New Grade** list, and select the grade abbreviation used in Tekla EPM.
4. Click **Set Shape/Grade**.

   Repeat steps 1 to 4 for all items that are listed in the **Translate Shapes/Grades** dialog box.

   If you save a shape or grade abbreviation, the shape or grade will not appear in the **Translate Shapes/Grades** dialog box when you import files in the future. You should only save the shape and grave abbreviations if the detailer has no intention of conforming to the abbreviations used in Tekla EPM.
5. When you have translated all necessary shapes and grades, click **OK** to close the dialog box and continue the import.

NOTE The dimensions matching the properties of the shape are added for the shape during the import. Remember to review the dimensions that are added during the import to ensure that the properties of the shape are completely defined in the **Shapes/Grades/Sizes** database.

See also

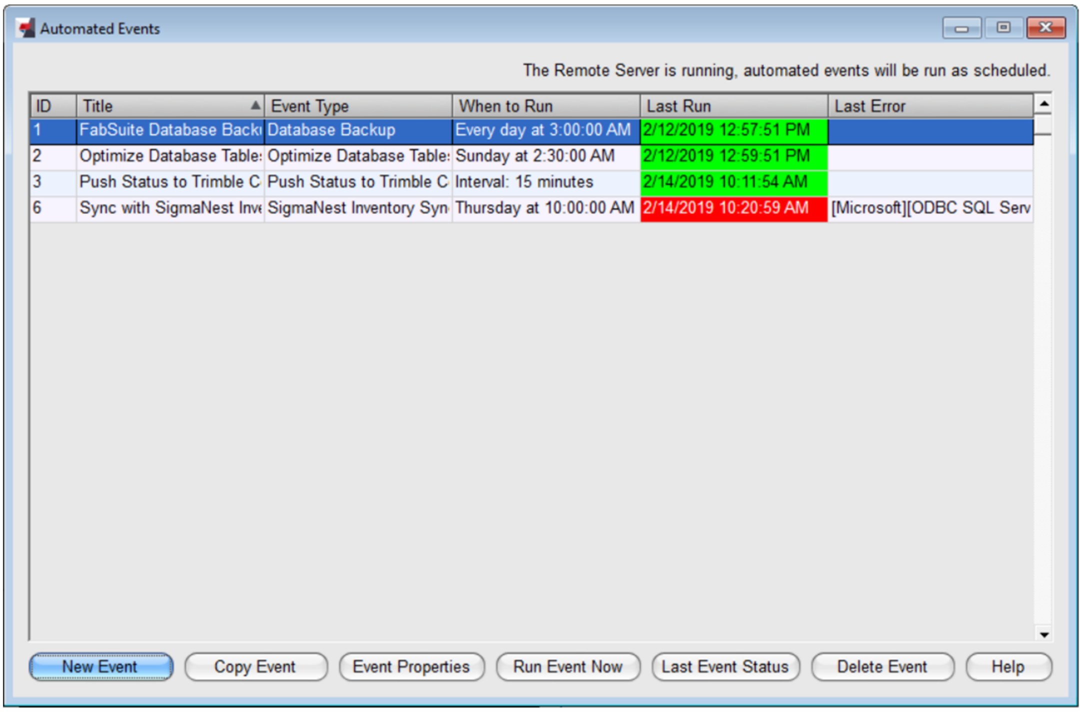
Import files to Tekla EPM (page 27)

1.7 Create, modify, and delete automated events

By creating automated events, you can receive automatic reports from Tekla EPM either on demand or automatically according to a set schedule. For example, automatic reports can be useful when you want to stay up to date on the progress of a project. You can choose to receive the reports by email, or save them in a particular folder.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Automated Events**.

The **Automated Events** dialog box opens.



Note that the Tekla EPM Remote Server must be running in order for automated events to run as scheduled.

If the Tekla EPM Remote Server is running normally, the message at the top of the dialog box is black.

If the Tekla EPM Remote Server is not running, the message at the top of the dialog box is highlighted in red and warns you that automated events will not be run as scheduled.

Define the outgoing email settings

You need to define the outgoing email settings to receive automatic reports or failure notifications by email.

1. In the dialog box, click the **Automated Events** ribbon tab.
2. In the menu, select **Outgoing Email Settings**.
3. On the **Outgoing SMTP Server** tab of the **Automated Event Email Settings** dialog box, select the **Enable Outgoing Email** check box.
4. Define the host, port, username, password, and sender name and email address.
5. To test the outgoing email server settings, click **Test**.
6. On the **Failure Notifications** tab, type the email addresses to which you want to send failure notifications.

7. Click **Save** to save the settings.

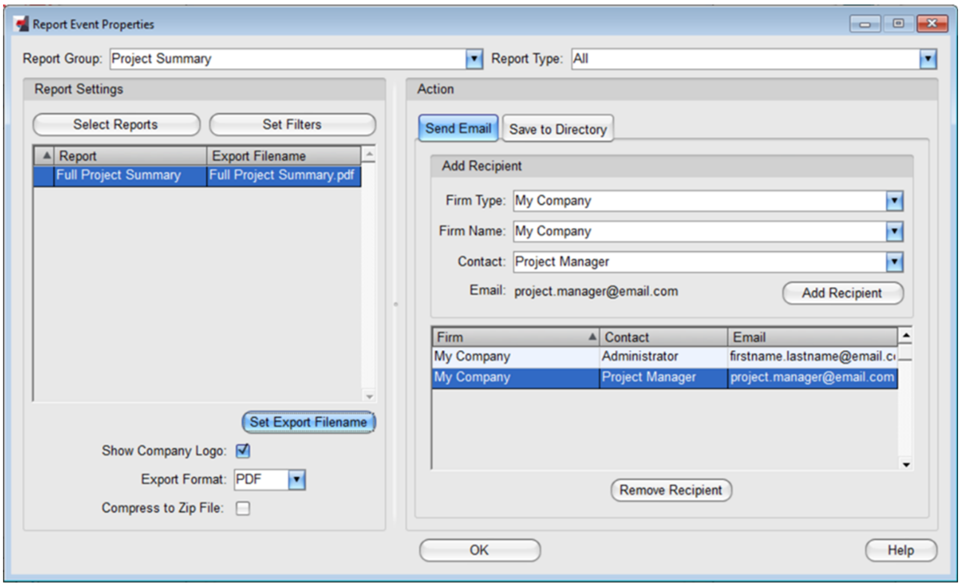
Create an automated event

1. In the **Automated Events** dialog box, click **New Event**.
2. In the **Automated Event Details** dialog box, type a title and a description for the event.
3. In the **Event Type** list, select what type of event you are creating.

   For example, to receive reports on the progress of a project, select the **Report** event type.

   Note that users cannot add or modify event types.
4. If you have created a report event, define the event properties as follows:
   a. Click the **Event Properties** button.

      The **Report Event Properties** dialog box opens.



   b. In the **Report Group** list at the top of the **Report Event Properties** dialog box, select which group the reports that you want to save or send belong to.
   c. Select the report list that contains the desired report.
   d. Click the **Select Reports** button.
   e. In the **Select Reports** dialog box, click the arrow buttons to move the reports that you want to include in the automated event to the **Included** list.
   f. Click **OK**.

      The selected reports are added to the list on the left.

g. If you want to filter the reports to only include particular items, click **Set Filters**.

h. If you want to change the name of the report file, click **Set Export Filename**, type the desired name, and click **OK**.

   You can view the placeholders available for file names and directories on the **Save to Directory** of the **Report Event Properties** dialog box. You can use these placeholders in the file names of reports to ensure that other files are not overwritten and that the event does not fail because a report with the same file name is open.

i. At the bottom of the dialog box, select if you want to show the company logo in the report files, and if you want to compress the reports into a .zip file.

j. In the **Export Format** list, select if you want to send or save the reports as PDF files or Microsoft Excel worksheets.

k. To send the report by email, on the **Send Email** tab, select firm type, company name, and contact person, and click **Add Recipient**.

   You can add more recipients by selecting a new firm type, company name, and contact person, and clicking **Add Recipient** again.

   Note that the company and contact person need to exist in the **Address Book**. The contact person also needs to have an email address in the **Address Book**.

l. To save the report in a folder, on the **Save to Directory** tab, click the **...** button, select the folder where you want to save the file, and click **OK**.

m. To save the settings of the report event, click **OK** at the bottom of the **Report Event Properties** dialog box.

5. Set the reporting frequency:

To	Do this
Create an automated event that repeats with a particular interval	a. In the **Repeat Type** list, select **Interval**. The **Interval** tab opens, allowing you to define the desired interval. b. In the **Interval Units** list, select if the interval is measured in hours, days, or weeks. c. In the **Value** field, type the number of hours, days, or weeks.
Create an automated event that repeats on particular days of the week	a. In the **Repeat Type** list, select **Scheduled**. The **Scheduled** tab opens on the bottom half of the dialog box, allowing you to define the schedule. b. Click **Add**.

To	Do this
	c. In the **Schedule on** list at the top of the **Automated Event Schedule**, select **Day of Week**. The **Day of Week** tab opens. d. Select check boxes next to the days when you want to run the automated event. e. In the **Run At** lists, select the time when your want to run the report. f. Click **Save** to save the event schedule. The **Automated Event Schedule** dialog box closes.
Create an automated event that repeats on a particular day of the month	a. In the **Repeat Type** list, select **Scheduled**. The **Scheduled** tab opens, allowing you to define the schedule. b. Click **Add**.ö c. In the **Schedule on** list at the top of the **Automated Event Schedule**, select **Day of Month**. The **Day of Month** tab opens. d. Define the day number. If you type `31`, the automated event runs on the last date of each month, including the months with less than 31 days. e. In the **Run At** lists, select the time when your want to run the report. f. Click **Save** to save the event schedule. The **Automated Event Schedule** dialog box closes.

6. Click **Save** to create the automated event.

Run an automated event manually

1. In the **Automated Events** dialog box, select the automated event that you want to run.
2. Click **Run Event Now**.
3. To confirm running the event, click **Yes** in the confirmation dialog box.

The event is run. Note that the event ID is highlighted with yellow in the **Automated Events** dialog box.

The **Status** dialog box opens, showing the progress of the event.

4. When the event has been run, click **OK** to close the **Status** dialog box.

If the event has been run successfully, the **Last Run** column displays the latest run time on a green background.

You can view the details of the last run by clicking the **Last Event Status** button.

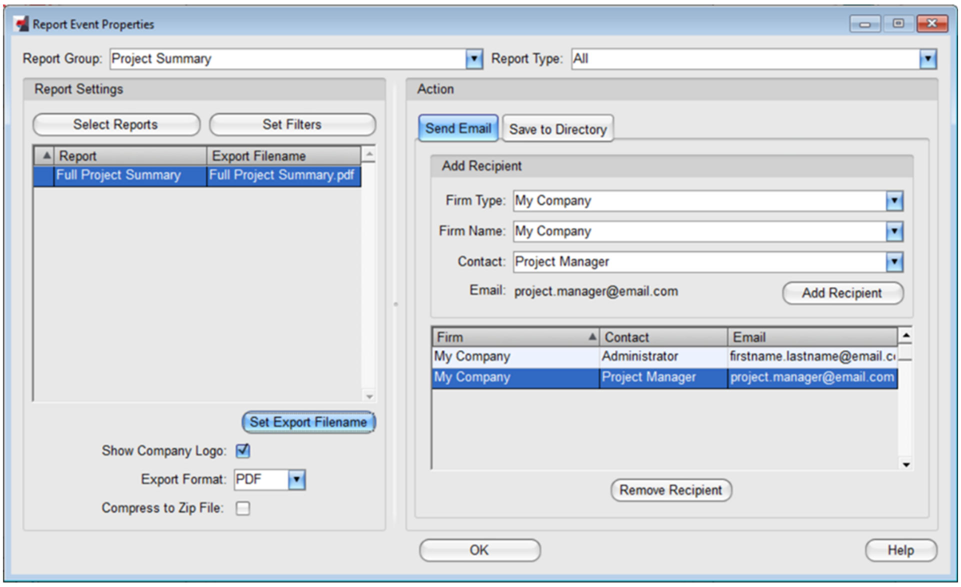
Copy an automated event

1. In the **Automated Events** dialog box, select the automated event that you want to copy.
2. Click **Copy Event**.
3. In the **Automated Event Details** dialog box, type a title and a description for the copied event.
4. Modify any other event properties according to your needs.
5. Click **Save** to save the properties of the copied event.

Modify an automated event

1. In the **Automated Events** dialog box, select the automated event that you want to modify.
2. Click **Event Properties**.
3. In the **Automated Event Details** dialog box, modify the title and the description for the event.
4. In the **Event Type** list, change the type of event according to your needs.
5. If you are modifying a report event, modify the event properties as follows:
    a. Click the **Event Properties** button.

The **Report Event Properties** dialog box opens.



b. In the **Report Group** list at the top of the **Report Event Properties** dialog box, select which group the reports that you want to save or send belong to.

c. If you want to use a customized report list, select the report list in the **Report Type** list.

d. Click the **Select Reports** button.

e. In the **Select Reports** dialog box, click the arrow buttons to move the reports that you want to include in the automated event to the **Included** list.

f. Click **OK**.

g. If you want to filter the reports to only include particular items, click **Set Filters**.

h. If you want to change the name of the report file, click **Set Export Filename**, type the desired name, and click **OK**.

i. At the bottom of the dialog box, select if you want to show the company logo in the report files, and if you want to compress the reports into a .zip file.

j. In the **Export Format** list, select if you want to send or save the reports as PDF files or Microsoft Excel worksheets.

k. To modify the recipients of the report, on the **Send Email** tab, do either of the following:

- To add a new recipient, select the firm type, company name, and contact person, and click **Add Recipient**.

  You can add more recipients by selecting a new firm type, company name, and contact person, and clicking **Add Recipient** again.

  Note that the company and contact need to exist in the **Address Book**. The contact person also needs to have an email address in the **Address Book**.

- To delete recipients, click the **Remove Recipient** button.

l. To change the save location of the report, on the **Save to Directory** tab, click the **...** button, select the folder where you want to save the file, and click **OK**.

m. To save the settings of the report event, click **OK** at the bottom of the **Report Event Properties** dialog box.

6. Modify the reporting frequency.
7. Click **Save** to update the automated event.

View the run history of an automated event

1. In the **Automated Events** dialog box, select the automated event whose entire run history you want to view.
2. Click **Event Properties**.
3. In the **Automated Event Details** dialog box, click **Result History**.
4. In the **Results** dialog box, review the result history of the automated event.

   If an error has occurred during a run, the **Error Message** column of the run is highlighted in red, and a brief description of the error is displayed.
5. To view more details about a particular run and its errors, select the run and click **Details**.
6. To close the **Results** dialog box, click the **Close** button (**X**) in the upper-right corner.

Delete an automated event

Note that deleting an automated event is permanent and cannot be undone.

1. In the **Automated Events** dialog box, select the automated event that you want to delete.
2. Click **Delete Event**.

3. To permanently delete the automated event, click **Yes** in the confirmation dialog box.

1.8 Customize Tekla EPM

You can customize different information in Tekla EPM, including the display and input fields in various dialog boxes, the menu options for contextual ribbon tabs, report lists, and reports.

For more information, see the following links:

Customize display fields (page 41)

Customize input fields (page 43)

Customize menu options (page 46)

Create customized report lists (page 50)

Create customized reports (page 55)

Customize display fields

You can customize the fields in the display area of **Combining**, **Estimating**, **Inventory**, **Project Management**, **Production Control**, and **Purchasing** dialog boxes. For example, you can change the column names and locations, move columns up and down, or adjust the column width or alignment.

For some modules, you can modify the display fields of the dialog boxes separately. For example, in the **Purchasing** module, you can customize the display fields separately for purchase orders and requisitions. Similarly, in **Project Management**, you can modify the display fields of drawings, change orders, RFIs, and journal entries separately.

1. Click the **Maintenance** ribbon tab.
2. In the menu, go to the desired module and select a suitable **Edit Display Fields** option.
3. In the **Display Fields** dialog box, click **Edit Types**.
4. In the left-hand list, select the set of settings that you want to modify.
5. Click the arrow buttons to move the fields that you want to show to the **Included** list.

   The fields marked with an asterisk (*) are required fields that need to always be in the **Included** list.
6. According to your needs, do any of the following.

Note that all options may not be available when customizing the display fields in different modules.

To	Do this
Change the order of the display fields	a. In the **Included Fields** list, select the field that you want to move. b. Click the **Move Up** and **Move Down** buttons to change the position of the field. Note that the top item in the list will be the column to the far left of the display area in the module.
Change the sort order of the display fields	a. In the **Included Fields** list, select the field whose sort order you want to change. b. Click the **Sort Order +** and **Sort Order -** to increase or decrease the sort value of the field.
Modify display field names, widths, and alignment	**NOTE** Be careful when customizing the names of display fields. Significant changes to the field names can prevent you from following the instructions given in the user guide or by the Tekla EPM support. a. In the **Included Fields** list, select the field that you want to modify. b. Click **Properties**. c. Type the desired values in the **Display Name** and **Field Width** fields. The display name appears in the column header, and the field width defines the width of the associated column. d. Select an alignment option in the **Alignment** list. The alignment affects the text alignments within the associated column. e. Click **OK** to save the changes.
Highlight the input field corresponding the selected display field	• At the top of the dialog box, select the **Highlight Input of Clicked Cell** check box. When you work in a dialog box and click a display field, the corresponding input field is highlighted.
Select how main pieces are highlighted in the **Production Control** module	• At the top of the dialog box, select an option in the **Highlight Main Piece** list. For example, if you select **Bold & Italic**, you can quickly identify main pieces at a glance. If you do not want main pieces to be highlighted in any way, select **None**.

To	Do this
Add display types	a. In the lower-left corner of the dialog box, click **New**. b. Enter a name for the new set of settings in the **Description** field. c. Click **Add**. d. In the left-hand list, select the new set of settings. e. Modify the settings according to your needs. f. Click **Save**. The changes you made are saved to the new set of settings.
Revert to the default settings	• At the bottom of the dialog box, click **Set to Default**.

7. Click **Save** to save the changes and then, click the **Close** button (**X**) in the upper-right corner to close the dialog box.

   The fields of the dialog box are updated and will be shown the next time you open the module.

8. In the **Type** list, select which settings you want to use by default in the associated dialog box.

   For example, you can select a set of personalized settings that you have created.

9. Click **Save**.

See also

Customize input fields (page 43)

Customize input fields

You can customize the fields in the input area of the **Combining**, **Estimating**, **Inventory**, **Project Management**, **Production Control**, and **Purchasing** dialog boxes according to your needs. For example, you can change the places of input fields, modify their names, change the field widths, and skip fields or preserve the value of fields when adding more items.

For some modules, you can modify the input fields of the dialog boxes separately. For example, in the **Purchasing** module, you can customize the input fields separately for purchase orders and requisitions. Similarly, in **Project Management**, you can modify the input fields of drawings, change orders, RFIs, and journal entries separately.

1. Click the **Maintenance** ribbon tab.

2. In the menu, go to the desired module and select a suitable **Edit Input Fields** option.
3. In the **Input Fields** dialog box, click **Edit Types**.
4. In the left-hand list, select the set of settings that you want to modify.
5. Click the arrow buttons to move the fields that you want to show to the **Included** list.

   The fields marked with an asterisk (*) are required fields that need to always be in the **Included** list.
6. According to your needs, do any of the following:

To	Do this
Select if you want to confirm all changes	• At the top of the dialog box, select the **Prompt on Edit** check box. Whenever you make changes in the associated dialog box, a confirmation dialog box appears and asks you to confirm the changes. If you do not want to have to confirm all changes, do not select the check box.
Change the order of the input fields	a. In the **Included Fields** list, select the field that you want to move. b. Click the **Move Up** and **Move Down** buttons to change the position of the field. The item at the top of the list will be the top field in the dialog box.
Change the input field names	**NOTE** Be careful when customizing the names of input fields. Significant changes to the field names can prevent you from following the instructions given in the user guide or by the Tekla EPM support. a. In the **Included Fields** list, select the field that you want to modify. b. Click **Set Display Name**. c. Type a new name in the field. d. Click **OK** to save the new name.
Skip input fields when using the tab key in input	a. In the **Included Fields** list, select the field that the users can skip. b. Select the **Skip Field** check box. The selected field can now be skipped when inputting information using the tab key. In order to add information to a skipped field, you need to click the field.

To	Do this
Preserve the value of a field when a new item is added	a. In the **Included Fields** list, select the field whose value you want to preserve for new items. b. Click the **Carry Over**: **No** button. The button name changes to **Carry Over**: **Yes**. For example, if you allow carrying over the **Shape** field, Tekla EPM uses the same shape for new items until you manually select a different one. **NOTE** Some fields cannot be carried over because the data in these fields is unique for each item. To clear the field when adding new items, click the **Carry Over** button again. The button name changes back to **Carry Over**: **No**.
Keep the additional labor when a new item is added	Note that the **Carry Over Additional Labor** check box is only available when customizing the input fields in the **Estimating** module. • At the top of the dialog box, select the **Carry Over Additional Labor** check box. Tekla EPM uses the same additional labor for new items until you manually select a different one.
Keep the standard clips when a new item is added	Note that the **Carry Over Standard Clips** check box is only available when customizing the input fields in the **Estimating** module. • At the top of the dialog box, select the **Carry Over Standard Clips** check box. Tekla EPM uses the same standard clips for new items until you manually select a different one.
Change the font size of the input fields	• In the **Font Size** field, type a new font size.
Change the input area width	• In the **Input Area Width** field, type the width in pixels.
Change the navigation tree width	• In the **Navigation Tree Width** field, type the width in pixels. To make the navigation tree narrower, type a value that is smaller than the current one, and to make it wider, type a greater value.
Add input types	a. In the lower-left corner of the dialog box, click **New**.

To	Do this
	b. Enter a name for the new set of settings in the **Description** field. c. Click **Add**. d. In the left-hand list, select the new set of settings. e. Modify the settings according to your needs. f. Click **Save**. The changes you made are saved to the new set of settings.
Revert to the default settings	• At the bottom of the dialog box, click **Set to Default**.

7. Click **Save** to save the changes and then, click the **Close** button (**X**) in the upper-right corner to close the dialog box.

   The fields of the dialog box are updated and will be shown the next time you open the module.

8. In the **Type** list, select which settings you want to use by default in the associated dialog box.

   For example, you can select a set of personalized settings that you have created.

9. Click **Save**.

See also

Customize display fields (page 41)

Customize menu options

You can customize the drop-down menu options available in the **Combining**, **Estimating**, **Inventory**, **Production Control**, and **Purchasing** modules. For example, you can add or modify the options visible in the menu, and define shortcuts to access the different menu commands.

For the **Purchasing** module, you can customize the menu items separately for purchase orders and requisitions.

NOTE Be careful when customizing the menu options. Significant changes to the menu options can prevent you from following the instructions given in the user guide or by the Tekla EPM support.

1. Click the **Maintenance** ribbon tab.
2. In the menu, go to the desired module and select **Menu Setup** .

The **Menu Setup Types** dialog box opens.

The dialog box contains two types of items:

- Text items that serve as headings that group different commands.
- Action items (marked with *), which are commands in the menu.

Note that the current menu items of the module match the options in the **Included** list.

3. Click **Edit Types**.
4. To create personalized menu setup settings, click **New**.

   Creating personalized settings is useful because you can use a menu setup that meets your personal needs, while the default settings remain untouched.
5. In the **Description** field, type a name for the personalized settings.
6. To start customizing the menu, click **Save**.
7. In the left-hand list, select the settings that you want to customize.
8. According to your needs, do any of the following:

To	Do this
Add a text item to the menu	Text items serve as headings under which you can place action items, or items that are marked with an asterisk (*). a. In the **Included** list, select the item under which you want to add a text item. b. Click **Add Text Item**. c. Type text for the item. This text will be visible in the drop-down menu. d. Click the new text item in the **Included** list to select it. e. To add action items under the text item, click an action item in the **Not Included** list to select it. f. Click **>** to add the item under the new text item. The action item is moved under the text item.
Add a line to separate menu items	a. In the **Included** list, select the text item under which you want to add the line. b. Click **Add Line**.
Change the order of the menu items	a. In the **Included** list, select the item that you want to move in the menu. b. Click the **Up** and **Down** buttons to change the position of the menu item.
Add a shortcut	a. In the **Included** list, select the item to which you want to add a shortcut.

To	Do this
	b. In the **Shortcut** list, select a shortcut that you want to use to access the menu item. c. Click **Update**.
Change the name of a menu item	a. In the **Included** list, select the menu item that you want to rename. b. Click the **Edit Text** button. c. Type a new name for the menu item. d. Click **OK**.

9. Click **Save** to save the changes and then, click the **Close** button (**X**) in the upper-right corner to close the dialog box.
10. In the **Type** list, select the settings that you want to use when working in the associated module.
11. Click **Save**.

The menu items are updated to match the changes that you made.

Customize the layout of a dialog box

Use the **Customize grid** command to customize how and what information is displayed in different dialog boxes in Tekla EPM. For example, you can add new columns, change the column headers and column placement, and add spaces between rows and columns.

1. Open the desired dialog box.
2. Right-click anywhere in the display area of the dialog box.
3. In the context menu, click **Customize grid**.
4. To create a customized layout, in the **Grid Layout** dialog box, click **New Layout**.
5. Type a description for the layout.
6. Modify the following properties according to your needs:

Option	Description
Grid Mode	Allows you to select if you want the job list to have a fixed width or an automatically scaling width. Click the arrow on the right side of **Grid Mode** field, and select a suitable option in the list.

Option	Description
Number of rows per record	Allows you to have more than one row for each job, or record. By adding rows, you can either place the job information on multiple rows. Type the desired number of rows in the **Number of rows per record** field.
Default for all users	When selected, the layout that you are adding or modifying will be used as the default layout for all Tekla EPM users.
Current row	The row on which you are adding fields. The **Current row** only applies if the value in the **Number of rows per record** field is greater than 1. Click the arrow on the right side of **Current row** field, and select a row number in the list.
Fixed Columns	Allows you to freeze a desired number of columns from the top of the list, so that you can see them all the time when you scroll across different columns. Type the number of columns that you want to freeze in the **Fixed Columns** field.

7. In the **Available Fields** list, select the columns that you want to include in the dialog box, and click the arrow buttons to move them to the **Included Fields** list.
8. According to your needs, do any of the following:

To	Do this
Add an empty column	• On the right side of the dialog box, click **Add Empty**. An empty entry appears at the bottom of the list. This means that the empty column is the rightmost column in the selection dialog box. If necessary, you can still modify the location of the empty column. To remove the empty field, move it to the **Available Fields** list.
Change the order of columns	a. In the **Included Fields** list, click the column that you want to move left or right. b. Click the **Move Up** and **Move Down** buttons to move the column according to your needs. Note that the top field represents the leftmost column in the selection dialog box. Similarly,

To	Do this
	the bottom field represents the rightmost column in the dialog box.
Change the sort order of columns	a. In the **Included Fields** list, click the column whose sort order you want to change. b. Click the **Sort Order +** and **Sort Order -** to increase or decrease the sort value of the field.
Modify the column name, width, style, and alignment	a. In the **Included Fields** list, click a column to select it. b. Click **Properties**. c. Type the desired values in the **Display Name** and **Width** fields. The display name appears in the column header and the field width defines the width of the associated column. d. To modify the style of the column header, in the **Style** section, select any check boxes according to your preferences. e. Select an alignment option in the **Alignment** list. The alignment affects the text alignments within the associated column. f. If you want to hide all values in the column, select the **Hide Display** check box. g. Click **OK** to save the changes.

9. To save the customized layout, click **Save Layout**.
10. To use the layout in the selection dialog box, click **Apply Layout**.

    You can revert to the default layout or the current layout at any time by clicking the **Use Default State** and **Use Current State** buttons.

Create customized report lists

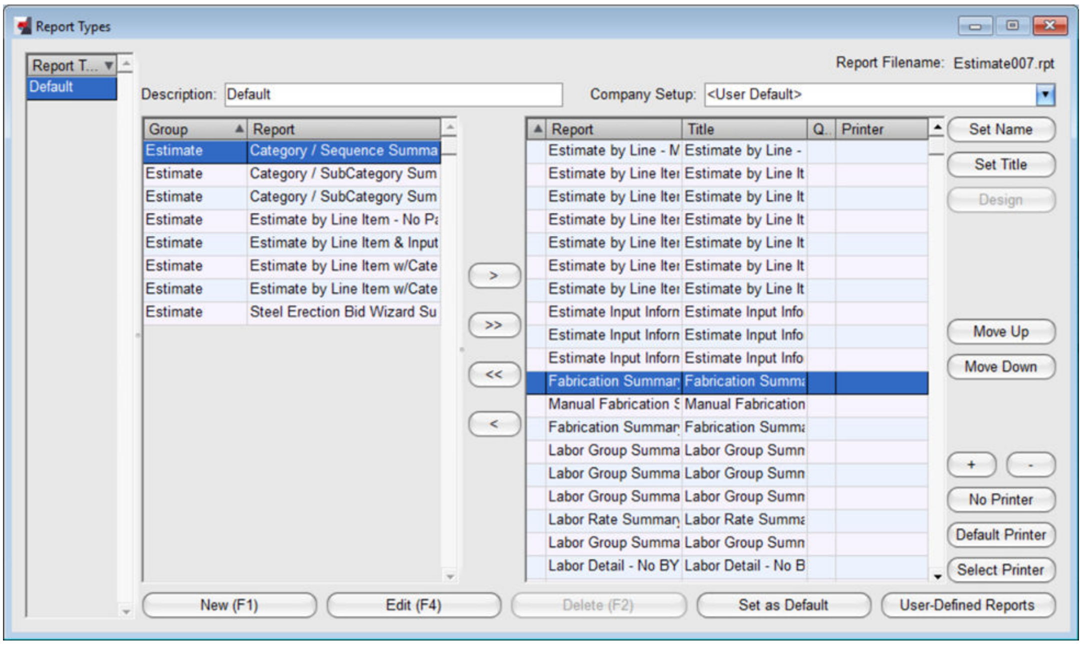
You can create customized report lists for different Tekla EPM users, so that each user can view their most used reports by default. You can also add user-defined reports in the report lists.

Note that report lists need to be created separately for each Tekla EPM module.

1. In any Tekla EPM job, click the associated ribbon tab.
2. In the menu, select **Reports**, or press **Ctrl+R** on the keyboard.

3. To only include particular information in the reports, in the **Report Filters** dialog box, select a filter type in the **Type** list, and click **Select**.
4. In the **Filter** dialog box, do one of the following depending on the filter type:
   - Click the arrow buttons to move the information that you want to include to the **Included** list.
   - Type the maximum and minimum values for the items that you want to include.
5. Click **OK**.
6. Depending on the dialog box that opens, do the following:
   - In the **Report Selection** dialog box, click **Edit Report Types**.
   - In the **Report Progress** dialog box, click **Edit**.

The **Report Types** dialog box opens.



Create a report list

1. At the bottom of the **Report Types** dialog box, click **New**.
2. Type a description for the report type list.

   For example, you can type the user's name.
3. If you have created multiple companies in the **Company Information** dialog box, click the arrow on the right side of the **Company Setup** list and select the company that you want to include when creating reports.

4. Click the arrow buttons to move the reports that you want to include in the report list to the list on the right side of the dialog box.

   The reports on the left side of the dialog box are not displayed in the report list.

5. To modify the reports in the list, do any of the following:

To	Do this
Change the report name	The report name determines what the report is called in the **Report Selection** or the **Report Progress** dialog box. a. Select the report in the list on the right side of the dialog box. b. Click **Set Name**. c. In the **Enter Value** dialog box, type a new name for the report. d. Click **OK** to save the new report name.
Change the report title	The report title is displayed at the top of the report when you view, print, or export the report. a. Click **Set Title**. b. In the **Enter Value** dialog box, type a new name for the report. c. Click **OK** to save the new report title.
Move the report up or down in the report list	a. Click the **Move Up** and **Move Down** buttons until the report is in the desired location in the report list.
Change the default number of printed copies	a. Select the report in the list on the right side of the dialog box. b. Click the **+** and **-** buttons until the report has the desired number of copies.
Change the printer used when printing the report	a. Select the report in the list on the right side of the dialog box. b. Click **Select Printer**. c. In the **Select Printer** dialog box, click a printer to select it. d. Click **OK** to save the printer settings.
Create a custom report and add it to the report list	a. Click **User-Defined Reports**. b. In the **User-Defined Reports** dialog box, click **New**. c. Select the report that you want to use as the basis of the user-defined report.

To	Do this
	d. Click **Select Base Report**. e. Define the report name and title. The report name determines what the report is called in the **Report Selection** or the **Report Progress** dialog box. The report title is displayed at the top of the report when you view, print, or export the report. f. Click **Add**. g. To close the **User-Defined Reports** dialog box, click the **Close** button (**X**) in the upper-right corner. h. Click the arrow buttons to move the custom report to the list on the right side of the **Report Types** dialog box.

6. Click **Add**.

The report list can now be selected in the left-side pane of the **Report Selection** dialog box or the **Report List** list in the **Report Progress** dialog box.

Set the default report list

A default report list is the report list initially displayed in the **Report Selection** or **Report Progress** dialog box. To change the default report list, do the following:

1. In the left-hand pane of the **Report Types** dialog box, select the report list that you want to set as the default option.
2. Click **Set as Default**.
3. To confirm using the selected report list as the default option, click **Yes** in the confirmation dialog box.

Modify a report list

1. In the left-hand pane of the **Report Types** dialog box, select the report list that you want to modify.
2. If you have created multiple companies in the **Company Information** dialog box, click the arrow on the right side of the **Company Setup** list and select the company that you want to include when creating reports.

3. Click the arrow buttons to move the reports that you want to include in the report list to the list on the right side of the dialog box.

   The reports on the left side of the dialog box are not displayed in the report list.

4. To modify the reports in the list, do any of the following:

To	Do this
Change the report name	The report name determines what the report is called in the **Report Selection** or the **Report Progress** dialog box. a. Select the report in the list on the right side of the dialog box. b. Click **Set Name**. c. In the **Enter Value** dialog box, type a new name for the report. d. Click **OK** to save the new report name.
Change the report title	The report title is displayed at the top of the report when you view, print, or export the report. a. Click **Set Title**. b. In the **Enter Value** dialog box, type a new name for the report. c. Click **OK** to save the new report title.
Move the report up or down in the report list	a. Click the **Move Up** and **Move Down** buttons until the report is in the desired location in the report list.
Change the default number of printed copies	a. Select the report in the list on the right side of the dialog box. b. Click the **+** and **-** buttons until the report has the desired number of copies.
Change the printer used when printing the report	a. Select the report in the list on the right side of the dialog box. b. Click **Select Printer**. c. In the **Select Printer** dialog box, click a printer to select it. d. Click **OK** to save the printer settings.

5. Click **Edit** to save the changes.

To create customized reports and add them to report lists in Tekla EPM, see Create customized reports (page 55).

Delete a report list

Note that deleting a report list is permanent and cannot be undone.

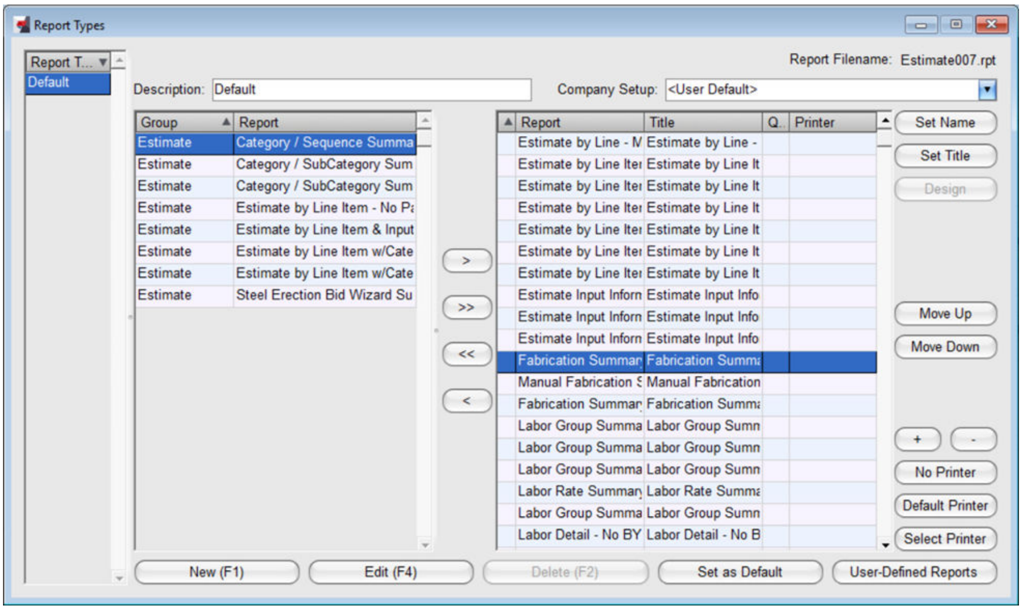
1. In the left-hand pane of the **Report Types** dialog box, select the report list that you want to delete.
2. Click **Delete**.
3. To permanently delete the report list, click **Yes** in the confirmation dialog box.

Create customized reports

Reports are template files that are used to display the filtered information from the Tekla EPM database. Tekla EPM automatically looks for the template first in the **Custom Report** folder set in the **Default Directories** dialog box, and after that, in the `C:\Program Files (x86)\Tekla EPM\Reports` folder. You can add a customized report to Tekla EPM by selecting an existing report that you want to use as the basis of the new report, and adding a new template file name in Tekla EPM.

Save the new report template in the custom report folder overwriting the report file name created for the new report that was displayed in the user defined report window. Now your new report is available.

1. Open the **Report Selection** dialog box where you can see the report that you want to use as the basis of the customized report.
2. In the upper-left corner of the dialog box, click **Edit Report Types**.
3. At the lower-right corner of the **Report Types**, click **User-Defined Reports**.



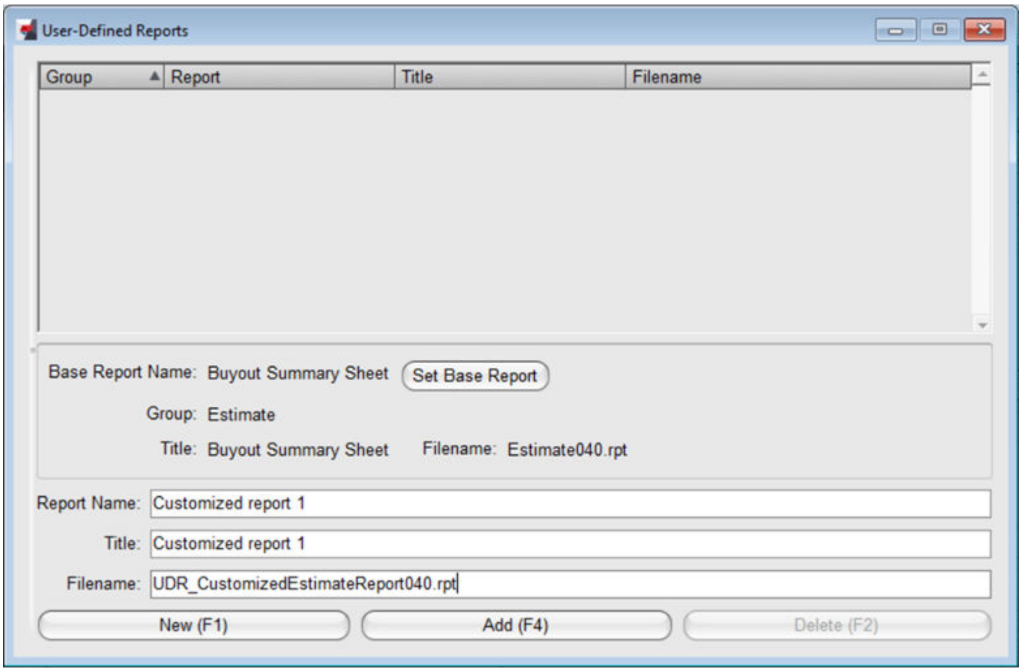
4. In the **User-Defined Reports** dialog box, click **New**.

5. In the **Select Base Report** dialog box, double-click the report that you want to use as the basis of the new report.

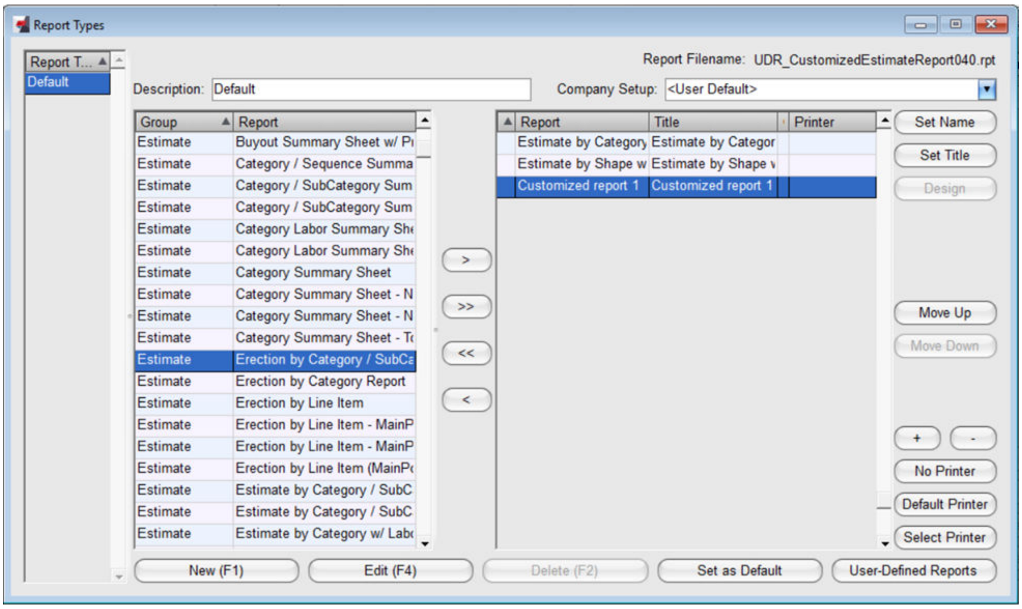
   The base report should contain all the correct tables and information for the new report. This can be achieved by modifying an existing report.

   In most cases, either the user who modified the base report or the report that you received tell you which base report you should select.

   When you have selected the base report, the file name of the base report appears at the bottom of the **User-Defined Reports** dialog box.



6. Type the desired name and title for the new report.
7. In the **Filename** field, type the desired file name for the new report.
8. Click **Add**.
9. To close the **User-Defined Reports** dialog box, click the **Close** button (**X**) in the upper-right corner.
10. In the **Report Types** dialog box, click the **>** button to move the customized report to the **Included** list.



11. Click **Edit** to save the changes.
12. Save the new report template in the **Custom Report** folder with the file name that you defined in the **User-Defined Reports** dialog box.

The customized report is now available in Tekla EPM.

See also

Create customized report lists (page 50)

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