



# Tekla EPM 2019

## Combining

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# 1 Set up the Combining module

In **Combining Maintenance**, you can create and modify the settings used when working in the **Combining** module. For example, you can set up the display and the input order listing views in **Combining Maintenance**. In addition to setting custom views, you can modify the menu setup and add keyboard shortcuts to make working more efficient.

**For more information, see the following links:**

[Define company standard settings for Combining \(page 5\)](#)

[Manage combining jobs \(page 9\)](#)

## 1.1 Define company standard settings for Combining

In the **Company Standards** dialog box, you can create default settings that become the company standard settings used in each combining job. If necessary, you can change the settings on a job by job basis.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Combining --> Company Standards**.
3. In the **Combining Company Standards** dialog box, adjust the following settings according to your needs:

| Option                 | Description   |
|------------------------|---|
| <b>Job # Increment</b> | <p>Allows you to select the default option for automatic job numbering. The options are:</p> <ul style="list-style-type: none"><li>• <b>Increment from Last Job #:</b><br/>When you create a new job, Tekla EPM uses the next available job number after the latest job number created.</li><li>• <b>Increment from Largest Job #:</b> Tekla EPM uses the next available job number after the largest job number created.</li></ul> |

| Option  | Description   |
|---|---|
|   | <ul style="list-style-type: none"> <li>• <b>Don't Increment:</b> Automatic job numbering is not used.</li> </ul> <p>You can modify the job number when you create a new job.</p>  |
| <b>Mark Input Type</b>                        | <p>Allows you to select which format is used when defining mark numbers.</p> <p>The <b>Any Input</b> and <b>Any Input - Logical Sort</b> options allows you to use any format when defining marks. The difference between the two options is that the <b>Any Input - Logical Sort</b> sorts the items in a different way.</p>   |
| <b>Auto-Increment</b>                         | <p>When selected, Tekla EPM automatically populates the new mark number with the next largest available mark number when you are adding items in the <b>Combining</b> dialog box.</p>   |
| <b>Auto-Increment From Last Entered Value</b> | <p>When selected, Tekla EPM automatically populates the new mark number with the next mark number from the latest added mark number when you are adding items in the <b>Combining</b> dialog box.</p>   |
| <b>Allow Blank</b>                            | <p>When selected, Tekla EPM allows blank mark numbers.</p>  |
| <b>Allow Duplicate</b>                        | <p>When selected, Tekla EPM allows duplicate mark numbers.</p>  |
| <b>Keep Job Selection Screen Open</b>         | <p>When selected, the <b>Select Combining Job</b> dialog box stays open after a job has been opened. Otherwise, the <b>Select Combining Job</b> dialog box will close when you open a combining job.</p>  |
| <b>Item Increment</b>                         | <p>Sets the auto-increment for item numbers.</p> <p>Using the default auto-increment of 10 allows items to be added in the list according to your needs, without having to renumber the other items in the job.</p> <p>For example, if items should be initially numbered as 10, 20, 30, ..., the input increment should be set to 10. If auto-increment of item numbers is not necessary, type 1 in the <b>Item Increment</b> field.</p> |
| <b>Job # Regular Expression</b>               | <p>Allows the use of regular expressions to enforce a desired format for the job numbers.</p> <p>For more detailed instructions on job number regular expressions, click <b>Regular Expression Help</b>.</p>  |

4. Click **Save**.

The changes you made are saved. You can further modify the company standards by clicking the **Input/Display Units**, **Combining Optimizations**, and **Suppliers** tabs.

## Define input and display units for Combining

You can use either metric or imperial units for displaying and entering sizes, lengths, weights, and prices in the **Combining** module. In addition, you can select how you want to enter the data for the length of the piece.

1. In the **Combining Company Standards** dialog box, click the **Input/Display Units** button.
2. In the **Input/Display Units** dialog box, click the arrows on the right side of the fields to select the units and the length input type.  
  
Note that there are multiple options depending on the required precision and the desired input method.
3. Click **OK**.
4. Remember to click **Save** in the **Combining Company Standards** to update the input and display units.

After saving the settings, the **Combining Company Standards** dialog box closes.

## Define default suppliers for Combining

You can define the desired suppliers, or pricing data sets, for angles, beams, plates, rods, tubes, and other material. This way, you can use material pricing from the selected supplier pricing data sets for each material group.

1. In the **Combining Company Standards** dialog box, click the **Suppliers** button.
2. In the **Suppliers** dialog box, click the arrows on the right side of the material group lists, and select the suppliers.
3. Click **OK**.
4. Remember to click **Save** in the **Combining Company Standards** dialog box to update the supplier settings.

### See also

[Define company standard settings for Combining \(page 5\)](#)

## Define combining optimizations for the Combining module

You can define company-level settings for multing and plate nesting for new combining jobs. The combining optimizations can be adjusted on a job by job basis.

1. At the bottom of the **Combining Company Standards** dialog box, click **Combining Optimizations**.
2. To use material grade substitutions with the optimization settings when performing a combining run, on the **General Settings** tab of the **Combining Setup** dialog box, select the **Use Grade Substitutions** check box.

Grade substitutions must be set in the **Shape / Grade / Size Maintenance** dialog box. If the grade substitutions are not set, the material grades in the combining run and in the supplier pricing data set or the inventory need to match each other exactly.

3. Click the arrow buttons to move the optimization options that you want to use to the **Optimizations Included** list.

The options are:

- **Inventory Exact-Match (In Stock):** Use this option for inventory items in stock that are an exact match without the use of kerf or clamp allowance.
- **Inventory Exact-Match (On Order):** Use this option for inventory items that are on purchase orders and have not yet been received and that are an exact match without the use of kerf or clamp allowance.
- **Inventory Least-Scrap (On Order):** Use this option for inventory items that are on purchase orders and have not yet been received and that will provide the least amount of scrap.
- **Inventory Least-Scrap (In Stock):** Use this option for inventory items in stock that will provide the least amount of scrap.
- **Warehouse Least-Scrap:** Use this option to give preference to warehouse items that will provide the least amount of scrap. Warehouse items will only be used when they provide less scrap than the available inventory items.
- **Warehouse Force Inventory:** Use this option to force the use of inventory regardless of the amount of scrap, no matter where it is located in the **Optimizations Included** list. This option is the opposite of **Warehouse Least-Scrap**.

Note that you can only include **Warehouse Least-Scrap** or **Warehouse Force Inventory**, not both.

4. Use the **Move Up** and **Move Down** buttons to modify the order of the optimizations.

The order is important while performing a combining run.

5. Click the **Mult Settings - Linear Material** tab to open it.
6. In **Multing Software**, select the multing software that you are using.
7. If you want to apply the material kerf settings defined in **Shape / Grade / Size Maintenance** to the combining as part of the cutting pattern, select the **Apply Kerf** check box.
8. Open the **Plate Nesting Settings** tab.
9. In the **Plate Nesting Software** list, click the plate nesting software that you are using to select it.
10. In the **Shear Cut Optimization** list, click a suitable shear cut option to select it.

The selected option determines the plate allowance to be used with the combining:

- Use **None** when cutting plate on a burn table.
  - Use **Shear Cut - First Cut Along Length** or **Shear Cut - First Cut Along Width** to alert Tekla EPM that the nesting needs to allow for that type of cut first. Then, the nesting will allow for all subsequent cuts to be made with that condition.
11. If the material grain direction is unimportant and you want Tekla EPM to create the best possible optimization of a plate, select the **Rotate Plates for Best Fit** check box.
  12. If necessary, select the **Apply Kerf** check box.  
For more details, see step 7.
  13. Click **Save**.
  14. Remember to click **Save** in the **Combining Company Standards** dialog box to update the combining optimizations.

When you have saved the settings, the **Combining Company Standards** dialog box closes.

### See also

[Define company standard settings for Combining \(page 5\)](#)

## 1.2 Manage combining jobs

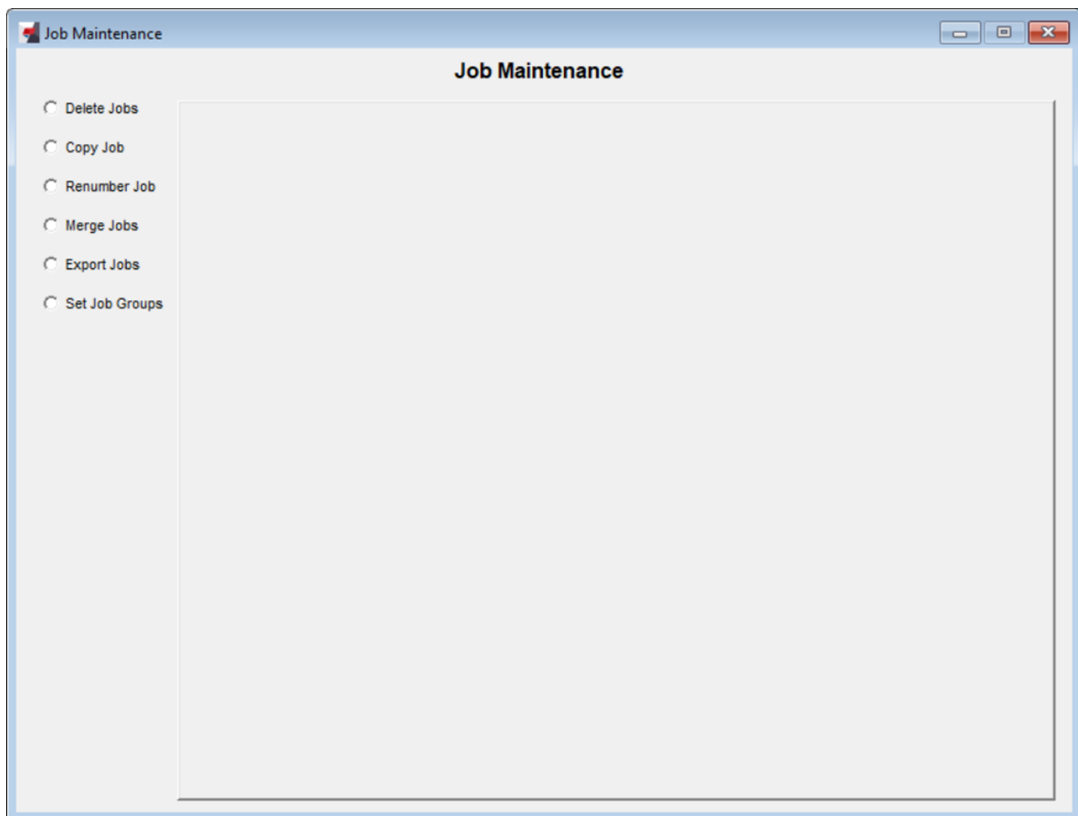
In **Job Maintenance**, you can manage existing combining jobs. You can copy, renumber, merge, export, and delete combining jobs, and set up job groups.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Combining --> Job Maintenance** .

3. In the **Job Maintenance** dialog box, select one of the available options to manage the existing jobs.

The options are:

- **Delete Jobs**
- **Copy Job**
- **Renumber Job**
- **Merge Jobs**
- **Export Jobs**
- **Set Job Groups**



**For more information, see the following links:**

[Delete combining jobs \(page 11\)](#)

[Copy a combining job \(page 11\)](#)

[Renumber a combining job \(page 11\)](#)

[Merge combining jobs \(page 12\)](#)

[Export combining jobs \(page 12\)](#)

[Set job groups for combining jobs \(page 13\)](#)

## Delete combining jobs

You can delete unnecessary combining jobs at any time in **Job Maintenance**. Note that the jobs are deleted permanently. If you want to use jobs for reference later, we recommend that you export the jobs before deleting them. Note that users with administrative rights can create a KISS file to restore a deleted combining job within 30 days from deleting the job.

1. In the **Job Maintenance** dialog box, select the **Delete Jobs** option.
2. In the list, select the job that you want to delete.
3. At the bottom of the dialog box, click **Delete**.
4. To delete the combining job, click **Yes** in the confirmation dialog box.

### See also

[Manage combining jobs \(page 9\)](#)

[Export combining jobs \(page 12\)](#)

## Copy a combining job

You can copy an existing job to use it as the base of a new similar job. Copying an existing job makes creating the new job quicker, as you do not have to set all properties manually or create items one by one.

1. In the **Job Maintenance** dialog box, select the **Copy Job** option.
2. In the list, select the job that you want to copy.
3. In the **New Job Number** field, type the desired first item number.
4. Click **Copy**.

Tekla EPM creates a new job based on the selected job. You can modify the properties of the new job in the **Combining** module.

### See also

[Manage combining jobs \(page 9\)](#)

## Renumber a combining job

You can renumber a job to re-establish the desired item number increments. To renumber items in an existing combining job, do the following:

1. In the **Job Maintenance** dialog box, select the **Renumber Job** option.
2. In the list, select a job.
3. In the **Set Value** field, type a new starting number.

4. In the **Item Number Increment** field, type the desired numbering increment.  
For example, use 1 for single digit (1, 2, 3, ...), 5 for increments of five (5, 10, 15, ...), and 10 for increments on ten (10, 20, 30, ...).
5. To select specific pages to renumber, do the following:
  - a. Click **Edit** on the right side of the **Pages** field.
  - b. Click the arrow buttons to move the page numbers that you want to renumber to the **Included** list..
  - c. Click **OK**
6. Click **Renumber**.

#### See also

[Manage combining jobs \(page 9\)](#)

### Merge combining jobs

You can create a new job by merging two existing jobs.

1. In the **Job Maintenance** dialog box, select the **Merge Jobs** option.
2. In the list, select the jobs that you want to merge.  
To select multiple items, hold down **Ctrl**.  
To select a range of subsequent items, hold down **Shift**.
3. In the **New Job Number** field, type a number for the new job.
4. Click **Merge**.  
The new job appears in the list of jobs.

#### See also

[Manage combining jobs \(page 9\)](#)

### Export combining jobs

Export jobs before deleting them to make the jobs available for future reference.

1. In the **Job Maintenance** dialog box, select the **Export Jobs** option.
2. In the list, select the jobs that you want to export.
3. Click **Export**.
4. In the **Save As** dialog box, browse to the folder where you want to save the file.

5. Use the automatically generated name or type a new one.
6. Click **Save**.

Steps 4 to 6 repeat for all of the selected jobs.

The exported KISS file is saved to the selected location.

#### See also

[Manage combining jobs \(page 9\)](#)

### Set job groups for combining jobs

By setting job groups, you can provide a sorting method for combining jobs. For example, you can create job groups for commercial or industrial work, or by month or year.

1. In the **Job Maintenance** dialog box, select the **Set Job Groups** option.
2. In the list, select the jobs for which you want to create a job group.  
To select multiple items, hold down **Ctrl**.  
To select a range of subsequent items, hold down **Shift**.
3. In the first empty field after **New Group**, type a name for the new group.
4. Click **Set Group**.

The group name appears in the **Group** column for the selected job.

5. If necessary, add a secondary job group by typing a secondary group name in the second empty field after **New Group**.
6. Click **Set Secondary Group**.

The secondary group name appears after the primary group name in the **Group** column. The two groups are separated with a hyphen.

#### See also

[Manage combining jobs \(page 9\)](#)

# 2 Create advance bills of materials

Use the **Combining** module in Tekla EPM to create and import advance bills of materials. You can either enter bills of material manually or import them as Microsoft Excel worksheets, or KISS or CIS/2 files. The information in the imported files is automatically transferred into the applicable fields of the **Combining** module.

Once the materials have been entered in the **Combining** module, you can combine and re-combine them using different material lengths. Then, you can compare the different combinations.

You can also send the combining materials to a requisition for pricing, or to a purchase order. Tekla EPM then marks the items that are sent to purchasing, so that they cannot be sent to purchasing again.

## See also

[Open the Combining module \(page 15\)](#)

[Find a combining job \(page 15\)](#)

[Create a combining job \(page 16\)](#)

[Open a combining job \(page 20\)](#)

[Filter information in the Combining dialog box \(page 21\)](#)

[Copy a page of combining items \(page 22\)](#)

[Modify combining items \(page 23\)](#)

[Combine materials in the Combining module \(page 26\)](#)

[Load combining items into purchasing \(page 36\)](#)

[View all changes in a combining job \(page 39\)](#)

[Export a combining job to KISS \(page 40\)](#)

[View and print combining reports \(page 41\)](#)

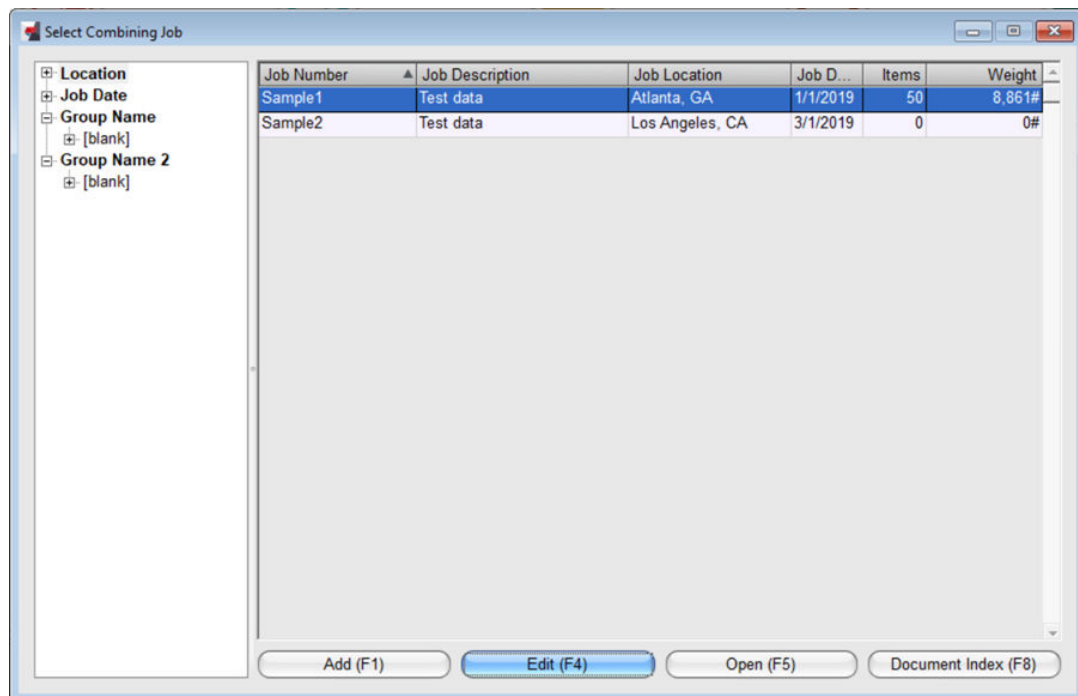
## 2.1 Open the Combining module

To create advance bills of material, you need to open the **Combining** module:

- Click the **Combining** button at the upper-left corner of the Tekla EPM window.



The **Select Combining Job** dialog box opens.



You can see all existing combining jobs. Next, you can create a new combining job, or open or modify an existing combining job.

### See also

[Create a combining job \(page 16\)](#)

[Open a combining job \(page 20\)](#)

## Find a combining job

Use search to find a specific combining job in the **Select Combining Job** dialog box.

1. At the top left corner of the Tekla EPM window, click **Combining**.  
The **Select Combining Job** dialog box opens.
2. Click the **Combining** ribbon tab.
3. In the menu, select **Find Job**, or press **Ctrl+F** on the keyboard.
4. In the **Enter Value** dialog box, click the arrow on the right side of the **Select a combining job** list, and select a combining job number.
5. Click **OK**.

The selected job is highlighted in the **Select Combining Job** dialog box. To open the job, double-click it, or click **Open**.

## 2.2 Create a combining job

You can create a combining job to Tekla EPM by simply defining the job number, job date, and shipping date, and then saving the new job. However, you can also further adjust the combining job properties to meet your needs: you can modify the combining optimizations, suppliers, and input and display units. The changes will override the company standard settings for the current combining job.

To delete or otherwise modify existing combining jobs, see [Manage combining jobs \(page 9\)](#).

To add a new combining job, do the following:

- At the bottom of the **Select Combining Job** dialog box, click **Add**.

The **Combining Job Edit** dialog box opens on the **General** tab.

The screenshot shows a software window titled "Combining Job Edit: [New]". It has three tabs: "General", "Customer", and "Input Options". The "General" tab is selected. Inside the tab, there are several input fields: "Job Date" with a date picker set to 2/1/2019, "Job #" with a text box containing "Sample2", "Shipping Date" with a date picker set to 3/1/2019, "Job Description" with a text box containing "Sample job 2", "Job Location" with a text box containing "Atlanta, Georgia", "Job Group" with two empty dropdown menus, "Comment" with a text box, and "Project Management Job" with a dropdown menu. At the bottom of the window, there are four buttons: "Combining Optimizations", "Suppliers", "Input/Display Units", and a larger "Save (F4)" button.

Note that you can also modify the combining job settings on the **Customer** and **Input Options** tabs.

## Define general, customer, and input settings

1. On the **General** tab, modify the job number, job date, and shipping date according to your needs.

These are the only mandatory details in the **Combining Job Edit** dialog box.

2. According to your needs, add other applicable combining job information.

For example, you can add a job description, location, or comments.

---

**TIP** We recommend that you use job groups to file similar jobs together. Using job groups makes locating the jobs easier. For more information on setting up and modifying job groups, see [Manage combining jobs \(page 9\)](#).

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3. If you want to link the new combining job to a project management job, select the project management job in the **Project Management Job** list.
4. On the **Customer** tab, add any relevant customer information.

5. On the **Input Options** tab, adjust how information can be entered in the combining job.
6. Do one of the following:
  - To create the new job without further modifying the settings, click **Save**.
  - Click the **Combining Optimizations**, **Suppliers**, and **Input/Display Units** buttons to further modify the properties of the new job.

## Modify combining optimizations

1. In the **Combining Job Edit** dialog box, click **Combining Optimizations**. The **General Settings** tab of the **Combining Setup** dialog box opens.
2. To use material grade substitutions with the optimization settings when performing a combining run, on the **General Settings** tab of the **Combining Setup** dialog box, select the **Use Grade Substitutions** check box.

Grade substitutions must be set in the **Shape / Grade / Size Maintenance** dialog box. If the grade substitutions are not set, the material grades in the combining run and in the supplier pricing data set or the inventory need to match each other exactly.

3. Click the arrow buttons to move the optimization options that you want to use to the **Optimizations Included** list.

The options are:

- **Inventory Exact-Match (In Stock):** Use this option for inventory items in stock that are an exact match without the use of kerf or clamp allowance.
- **Inventory Exact-Match (On Order):** Use this option for inventory items that are on purchase orders and have not yet been received and that are an exact match without the use of kerf or clamp allowance.
- **Inventory Least-Scrap (On Order):** Use this option for inventory items that are on purchase orders and have not yet been received and that will provide the least amount of scrap.
- **Inventory Least-Scrap (In Stock):** Use this option for inventory items in stock that will provide the least amount of scrap.
- **Warehouse Least-Scrap:** Use this option to give preference to warehouse items that will provide the least amount of scrap. Warehouse items will only be used when they provide less scrap than the available inventory items.
- **Warehouse Force Inventory:** Use this option to force the use of inventory regardless of the amount of scrap, no matter where it is

located in the **Optimizations Included** list. This option is the opposite of **Warehouse Least-Scrap**.

Note that you can only include **Warehouse Least-Scrap** or **Warehouse Force Inventory**, not both.

4. Use the **Move Up** and **Move Down** buttons to modify the order of the optimizations.

The order is important while performing a combining run.

5. Click the **Mult Settings - Linear Material** tab to open it.
6. If you want to apply the material kerf settings defined in **Shape / Grade / Size Maintenance** to the combining as part of the cutting pattern, select the **Apply Kerf** check box.
7. Open the **Plate Nesting Settings** tab.
8. In the **Shear Cut Optimization** list, click a suitable shear cut option to select it.

The selected option determines the plate allowance to be used with the combining:

- Use **None** when cutting plate on a burn table.
  - Use **Shear Cut - First Cut Along Length** or **Shear Cut - First Cut Along Width** to alert Tekla EPM that the nesting needs to allow for that type of cut first. Then, the nesting will allow for all subsequent cuts to be made with that condition.
9. If necessary, select the **Apply Kerf** check box.  
For more details, see step 6.
  10. If the material grain direction is unimportant and you want Tekla EPM to create the best possible optimization of a plate, select the **Rotate Plates for Best Fit** check box.
  11. Click **Save**.
  12. Remember to click **Save** in the **Combining Job Edit** dialog box to save the changes.

The combining optimization settings are saved for the new job.

## Modify suppliers

1. In the **Combining Job Edit** dialog box, click the **Suppliers** button.
- 2.
3. In the **Suppliers** dialog box, click the arrows on the right side of the material group lists, and select the suppliers.
4. Click **OK**.

5. Remember to click **Save** in the **Combining Job Edit** dialog box to save the changes.

## Modify the input and display units

1. In the **Combining Job Edit** dialog box, click **Input/Display Units**.
2. In the **Input/Display Units** dialog box, click the arrows on the right side of the fields to select the units and the length input type.

Note that there are multiple options depending on the required precision and the desired input method.

3. Click **OK**.
4. Remember to click **Save** in the **Combining Job Edit** dialog box to save the changes.

## 2.3 Open a combining job

To view the details and add new items to a combining job, you need to open it in the **Combining** dialog box.

1. At the top left corner of the Tekla EPM window, click **Combining**.  
The **Select Combining Job** dialog box opens.
2. In the **Select Combining Job** dialog box, click the job that you want to open in the navigation tree on the left, or use the **Find Job** command.
3. Double-click the job, or select it and click **Open**.

The combining job opens in the **Combining** dialog box.

The screenshot shows the 'Combining: Sample1 - Test data' dialog box. It features a table of materials with columns for Quantity, Length, Square Feet, Weight, and Surface Area. The table is sorted by Page in ascending order. On the right side, there are input fields for Total and Each values for Length, Square Feet, Weight, and Surface Area. Below these, there are fields for Page, Item, Mark, Quantity, Allocated, Shape, Dimensions, Length, Grade, Reference #, Category, Sub-Category, Sequence, and Comment.

| Quantity     | Length     | Square Feet | Weight        | Surface Area   |
|--------------|------------|-------------|---------------|----------------|
| Selected 1   | 29.46 ft.  | 0.00 SqFt.  | 2,121.00 lbs. | 176.11 SqFt.   |
| Displayed 79 | 433.24 ft. | 0.00 SqFt.  | 8,861.10 lbs. | 1,193.51 SqFt. |
| Total 79     | 433.24 ft. | 0.00 SqFt.  | 8,861.10 lbs. | 1,193.51 SqFt. |

| Page | Item | Mark | Quantity | Shape | Dimension   | Length     | Ref # |
|------|------|------|----------|-------|-------------|------------|-------|
| 1    | 10   | 1A   | 1        | W     | 12 x 72     | 29'-5 1/2  | 1A    |
| 1    | 50   | a16  | 3        | L     | 3 x 3 x 1/4 | 1'-2       | a16   |
| 1    | 60   | a18  | 2        | L     | 3 x 3 x 1/4 | 0'-5 1/2   | a18   |
| 1    | 70   | a19  | 1        | L     | 3 x 3 x 1/4 | 0'-5 1/2   | a19   |
| 1    | 80   | w23  | 1        | W     | 8 x 31      | 0'-9 3/4   | w23   |
| 1    | 90   | 1B   | 1        | W     | 8 x 31      | 29'-4      | 1B    |
| 1    | 120  | a14  | 3        | L     | 3 x 3 x 1/4 | 1'-0       | a14   |
| 1    | 130  | a15  | 3        | L     | 3 x 3 x 1/4 | 1'-0       | a15   |
| 1    | 150  | w26  | 1        | W     | 8 x 31      | 0'-11 7/8  | w26   |
| 10   | 10   | 10A  | 1        | C     | 12 x 20.7   | 26'-1 7/16 | 10A   |
| 10   | 20   | a20  | 1        | L     | 3 x 3 x 1/4 | 0'-5       | a20   |
| 10   | 30   | a26  | 3        | L     | 3 x 3 x 1/4 | 0'-5       | a26   |
| 10   | 40   | a30  | 1        | L     | 3 x 3 x 1/4 | 0'-8 1/2   | a30   |
| 10   | 60   | 10B  | 1        | C     | 12 x 20.7   | 26'-4 9/16 | 10B   |
| 10   | 70   | a20  | 3        | L     | 3 x 3 x 1/4 | 0'-5       | a20   |
| 10   | 80   | a26  | 1        | L     | 3 x 3 x 1/4 | 0'-5       | a26   |
| 10   | 90   | a30  | 1        | L     | 3 x 3 x 1/4 | 0'-8 1/2   | a30   |
| 10   | 110  | 10C  | 1        | C     | 12 x 20.7   | 27'-0 1/8  | 10C   |
| 10   | 120  | a20  | 1        | L     | 3 x 3 x 1/4 | 0'-5       | a20   |
| 10   | 130  | a26  | 3        | L     | 3 x 3 x 1/4 | 0'-5       | a26   |
| 10   | 140  | a30  | 1        | L     | 3 x 3 x 1/4 | 0'-8 1/2   | a30   |

The materials are listed in the display area at the center of the dialog box.

You can add or modify information for items in the input area on the right side.

To customize the **Combining** dialog box according to your preferences, see the instructions in [Define company standard settings for Combining \(page 5\)](#).

## See also

[Find a combining job \(page 15\)](#)

## Filter information in the Combining dialog box

You can create filter settings to only show certain types of items in the **Combining** dialog box.

1. In the **Combining** dialog box, click the **Combining** ribbon tab.
2. In the menu, select **Filter**.
3. To only display specific types of items, in the **Combining Filters** dialog box, select a filter type in the **Type** list, and click **Select**.
4. Use the arrows at the center to move the items that you want to show to the **Included** side of the dialog box.

The items in the **Included** list will be shown when you apply the filter.

5. Click **OK**.

If you want to further filter the information displayed in the **Combining** dialog box, repeat steps 3 to 5 for different items. Note that only items that match the items in the **Included** list will be available when setting more filters.

If you want to clear all filter settings, click **Reset**.

6. To save commonly used filters, do the following:

- a. Click **Filter Types** in the lower-left corner.
- b. Click **New**.
- c. Type a description for the filter type.
- d. Create the filter settings.

For more information, see steps 3 to 5.

- e. Click **Add**.
- f. To close the dialog box, click the **Close** button (X) in the upper-right corner.

The newly created filter type is selected in the **Filter Types** list.

- g. To apply the filter type, click **Set**.

7. According to your needs, do one of the following:

- To use the filter, click **Apply Filter**.
- To use the filter in the job and save it until a new filter is set or the filter is cleared, click **Apply Filter & Save**.

Note that the filter will remain in use even if you close and re-open the job. After you clear the filters, the filter settings cannot be used again.

Only the items that you selected are shown in the **Combining** dialog box. To show all items again, click **Clear Filters**.

To delete all saved filters, click **Reset** at the bottom right corner of the **Filter** dialog box.

## 2.4 Copy a page of combining items

Use the **Copy Page** command to copy all items on a page of the combining job onto a new page.

1. In the **Combining** dialog box, select any item that is on the page that you want to copy.
2. Click the **Combining** ribbon tab.
3. In the menu, select **Copy Page**.

4. In the **Copy Page** dialog box, type the new page number in the **New Page #** field.
5. Click **Copy**.

The copied items are added to the **Combining** dialog box.

## 2.5 Modify combining items

You can modify existing combining items in a bill of materials either one by one or as a group. In addition, you can choose to modify items of a certain shape, or select the items to modify in the **Combining** dialog box.

**For more information, see the following links:**

[Modify a single combining item \(page 23\)](#)

[Modify multiple combining items \(page 23\)](#)

[Modify selected combining items \(page 24\)](#)

[Modify the shape, grade, dimension, or length of combining items \(page 25\)](#)

[Modify the shape, grade, dimensions, or length of selected combining items \(page 26\)](#)

### Modify a single combining item

You can modify a single combining item in a bill of materials directly in the **Combining** dialog box.

1. In the upper navigation tree or the display area, click the item that you want to modify.  
The properties of the selected item appear on the right side of the dialog box.
2. Modify the properties according to your needs.  
For example, you can select another category in the **Category** list or change the number in the **Quantity** field.
3. Click **Edit** to save the changes.

The properties of the selected combining item are saved and updated to the **Combining** dialog box.

## Modify multiple combining items

Use the **Global Edit** command to make specific changes to the properties of all or multiple items in a combining job at one go. This way, you can save time, as you do not need to change the properties of each item individually.

1. In the **Combining** dialog box, click the **Combining** ribbon tab.
2. In the drop-down menu, select **Global Edit** --> **Global Edit**.  
The **Combining Global Edit Filters** dialog box opens.
3. To only modify specific types of items, select a filter type in the **Type** list, and click **Select**.
4. In the **Filter** dialog box, click the arrow buttons to move the items whose properties you want to modify to the **Included** list.
5. Click **OK**. To further limit the items to be modified, repeat steps 3 to 5 for all necessary filter types.
6. At the bottom of the **Combining Global Edit Filters** dialog box, **OK**.
7. In the **Global Edit** dialog box, select check boxes next to the properties that you want to update.

You can also use the **Un-check All** and **Check Changed Fields** buttons to quickly clear or select check boxes.

8. Modify any properties in the **Global Edit** dialog box according to your needs.

For example, you can change the category of the items by selecting an option in the **Category** list, or type a comment for the items.

9. Click **Update**.

The **Global Edit** dialog box closes. The changes you made to the combining item properties are updated to the **Combining** dialog box.

## Modify selected combining items

Use the **Global Edit Selected** command to select a group of combining items in a bill of materials and modify their properties at one go.

1. In the **Combining** dialog box, select the items that you want to modify.  
To select multiple items, hold down **Ctrl**.  
To select a range of subsequent items, hold down **Shift**.
2. Click the **Combining** ribbon tab.
3. In the menu, select **Global Edit** --> **Global Edit Selected**.

4. In the **Global Edit** dialog box, select check boxes next to the properties that you want to update.  
  
You can also use the **Un-check All** and **Check Changed Fields** buttons to quickly clear or select check boxes.
5. Modify any properties in the **Global Edit** dialog box according to your needs.  
  
For example, you can change the category of the items by selecting an option in the **Category** list, or type a comment for the items.
6. Click **Update**.

The changes you made to the combining item properties are updated to the **Combining** dialog box.

## Modify the shape, grade, dimension, or length of combining items

Use the **Global Edit By Shape** command to modify the shape, grade, dimension, or length of the selected or filtered items in the **Combining** dialog box.

1. In the **Combining** dialog box, click the **Combining** ribbon tab.
2. In the menu, select **Global Edit --> Global Edit By Shape**.
3. In the **Shape** list at the top of the **Combining Global Edit Filters** dialog box, select the shape.
4. To only modify specific types of items, select a filter type in the **Type** list, and click **Select**.
5. In the **Filter** dialog box, click the arrow buttons to move the items whose properties you want to modify to the **Included** list.
6. Click **OK**.  
  
To further limit the items to be modified, repeat steps 4 to 6 for all necessary filter types.
7. At the bottom of the **Combining Global Edit Filters** dialog box, **OK**.
8. In the **Global Edit** dialog box, select check boxes next to the properties that you want to update.  
  
You can also use the **Un-check All** and **Check Changed Fields** buttons to quickly clear or select check boxes.
9. Modify any properties in the **Global Edit** dialog box according to your needs.  
  
For example, you can change the category of the items by selecting an option in the **Category** list, or type a comment for the items.

10. Click **Update**.

The changes you made to the combining item properties are updated in the Combining dialog box.

### **Modify the shape, grade, dimensions, or length of selected combining items**

Use the **Global Edit By Shape** command to modify the shape, grade, dimension, or length of the selected items in the **Combining** dialog box.

1. In the **Combining** dialog box, select the items that you want to modify.
2. Click the **Combining** ribbon tab.
3. In the menu, select **Global Edit --> Global Edit Selected By Shape**.
4. In the **Global Edit** dialog box, select check boxes next to the properties that you want to update.

You can also use the **Un-check All** and **Check Changed Fields** buttons to quickly clear or select check boxes.

5. Modify any properties in the **Global Edit** dialog box according to your needs.
6. Click **Update**.

The changes you made to the combining item properties are updated to the **Combining** dialog box.

## **2.6 Combine materials in the Combining module**

To mult and nest materials in the **Combining** dialog box, use the **Combine** command. You can then save and review the combining results.

1. In the **Combining** dialog box, click the **Combining** ribbon tab.
2. In the menu, select **Combine**.

The **Select Combining Run** dialog box opens. When you are performing the first combining run for a combining job, the list in the dialog box is empty.

3. Click a desired combining option to select it.

The options are:

- **Mult:** combines linear items, like beams and angles.
- **Nest:** combines items that have area, like plates or gratings.

- **Mult & Nest:** combines all items.

The **Combining Run Filters** dialog box opens.

---

**NOTE** Filtering items is optional, so you can skip steps 4 to 7 if you do not want to filter out items from the combining run.

---

4. To only combine specific types of materials, select a filter type in the **Type** list, and click **Select**.
5. In the **Filter** dialog box, do one of the following depending on the filter type:
  - Click the arrow buttons to move the items that you want to combine to the **Included** list.
  - Type the maximum and minimum values for the items that you want to combine.
6. Click **OK** to apply the filter.  
Repeat steps 4 to 6 for each filter type that you want to set.
7. In the **Combining Run Filters** dialog box, click **OK**.
8. To ensure that you are using the correct settings, click the **Optimizations**, **INV Filter**, and **Suppliers** buttons.  
If necessary, you can modify the settings.
9. To combine the materials, click the button at the bottom of the **Combining Run Filters** dialog box, or press **F4**.

Tekla EPM combines the materials. After the combining process is finished, the **Combining Run Results** dialog box opens.

- Piece mark items included with the selected stock lengths are displayed at the lower-left section of the dialog box.
- Combining results are shown in both the display area and in the summary grid at the lower-right section of the dialog box.
- The material cost represents the pricing of the materials in the pricing database that was used in the combining run.

---

**TIP** You can save the combining run to view it later and compare it with another combining run. To do so, click **Save Combining Run** at the bottom of the **Combining Run Results** dialog box. No cut lists are generated when you save the combining run.

---

## Rename a combining run

When you save a combining run, Tekla EPM automatically uses the date/time stamp as the combining run name. You can also rename the combining run.

Renaming the combining run makes it easier to identify a specific combining run when you want to compare combining runs.

1. In the **Combining Run Results** dialog box, click the **Run Description** button.
2. In the **Enter Value** dialog box, type a new name for the combining run.
3. Click **OK**.

The name is updated. You can see the combining run name in the **Run Description** button at the bottom of the **Combining Run Results** dialog box.

## View combining run filter settings

You can view which filter settings are used in the current combining run. Note that you cannot modify the filter settings of the combining run.

1. In the **Combining Run Results** dialog box, click the **Combining Run** ribbon tab.
2. In the menu, select **View Filters**.
3. In the **Combining Run Filters** dialog box, do one or more of the following:
  - To view the optimization settings used for the combining run, click **Optimizations**.
  - To view the combining run inventory filter setting used for the combining run, click **INV Filter**.
  - To view the supplier settings used for the combining run, click **Suppliers**.
4. When you have viewed the settings, click the **Close** button (**X**) in the upper-right corner of the dialog box.

The **Combining Run Filters** dialog box closes.

## Modify run-specific pricing information

After performing the first combining run, you can modify length options that are only used in that specific combining job. For example, L 3 x 3 x ¼ materials have 40'0 and 20'0 lengths. If you only want to combine the 20'0 lengths, you need to delete the 40'0 lengths from **Run-Specific Pricing Maintenance**. Any

changes that you make will override the values in the global pricing database, but only for the current combining run.

You can also modify a group of items in the combining run at one go. For more information, see [Modify a group of items in run-specific pricing maintenance \(page 31\)](#).

1. In the **Combining Run Results** dialog box, click the **Combining Run** ribbon tab.
2. In the menu, select **Run-Specific Pricing Maintenance**.
3. In the **Pricing Maintenance** dialog box, do any of the following according to your needs:

| To  | Do this   |
|---|---|
| Add material shapes, grades and dimensions              | <ol style="list-style-type: none"> <li>a. At the bottom of the dialog box, click <b>Add</b>.</li> <li>b. In the <b>Shape</b> list, select the shape.</li> <li>c. Click the <b>Dimensions</b> field and select the dimensions that you want to add.</li> <li>d. In the <b>Grade</b> list, select the grades that you want to add.</li> <li>e. Click <b>Save</b>.</li> </ol> <p>The shape, its dimensions, and grades are added to the navigation tree.</p>   |
| Modify existing material shapes, grades, and dimensions | <ol style="list-style-type: none"> <li>a. In the navigation tree, click the material dimension that you want to modify.</li> <li>b. At the lower-left corner of the dialog box, click <b>Edit</b>.</li> <li>c. In the <b>Shape</b> list, select the shape.</li> <li>d. Click the <b>Dimensions</b> field, and select the new dimensions in the dialog box that appears.</li> <li>e. In the <b>Grade</b> list, select the new grades.</li> <li>f. Click <b>Save</b>.</li> </ol> <p>The shape, its dimensions, and grades are updated to the navigation tree.</p> |
| Add lengths or sizes                                    | <ol style="list-style-type: none"> <li>a. In the navigation tree, click the material dimension for which you want to add lengths.</li> <li>b. Click <b>New</b> under the <b>Normal Price</b> field.</li> <li>c. Type the length and price.</li> <li>d. Click <b>Add</b>.</li> </ol> <p>The length is added to the list of lengths.</p>  |

| To                                     | Do this   |
|--|---|
| Modify or delete lengths               | <ol style="list-style-type: none"> <li>In the navigation tree, click the material dimension that you want to modify or delete.</li> <li>In the list of lengths, select a length.</li> <li>Do one of the following: <ul style="list-style-type: none"> <li>To modify the length, type a new length and price, and click <b>Edit</b>.</li> <li>To permanently delete the length, click <b>Delete</b>, and in the confirmation dialog box, click <b>Yes</b>.</li> </ul> </li> </ol>  |
| Change the pricing of a length         | <ol style="list-style-type: none"> <li>In the navigation tree, select the material dimension whose pricing you want to change.</li> <li>In the list on the right side of the dialog box, select a length.</li> <li>Do any of the following: <ul style="list-style-type: none"> <li>To modify the special price, type a new value in the <b>Special Price</b> field, and click <b>Save</b>.</li> <li>To modify the normal price, type a new value in the <b>Normal Price</b> field, and click <b>Edit</b>.</li> </ul> <p>You can also adjust the quantity and lengths of the material. To change the quantity to unlimited, type an asterisk (*) in the <b>Quantity</b> field. Click <b>Edit</b> to save the changes.</p> <p>The pricing of the length is updated.</p> </li> </ol> |
| Delete unnecessary material dimensions | <ol style="list-style-type: none"> <li>In the navigation tree, select the material dimension that you want to delete.</li> <li>At the bottom of the dialog box, click <b>Delete</b>.</li> <li>In the confirmation dialog box, click <b>Yes</b> to confirm deleting the dimension.</li> </ol>  |

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

The changes are saved for the current combining run. Now, you need to recombine the materials to update the combining results.

### See also

[Recombine all items \(page 32\)](#)

[Recombine items of a shape \(page 33\)](#)

[Recombine items of a material grade \(page 34\)](#)

[Recombine a material dimension \(page 34\)](#)

[Update combining information and recombine all items \(page 35\)](#)

### ***Modify a group of items in run-specific pricing maintenance***

You can modify the properties of a group of items while you are in the **Pricing Maintenance** dialog box. For example, you can only make certain lengths available for combining by using the **Set Lengths** option. Any changes that you make will override the values in the global pricing database, but only for the current combining run.

For information on how to access the **Pricing Maintenance** dialog box, see [Modify run-specific pricing information \(page 28\)](#).

1. In the **Pricing Maintenance** dialog box, click the **Pricing** ribbon tab.
2. In the menu, select **Global Edit**.
3. In the **Shape** list at the top of the **Pricing Global Edit** dialog box, select the shape whose grades and dimensions you want to modify.  
The grades and dimensions of the shape appear in the dialog box.
4. In the **Grades** section, click the arrow buttons to move the grades that you want to modify to the **Included** list.
5. In the **Dimensions** section, click the arrow buttons to move the dimensions that you want to modify to the **Included** list.
6. In the lower-right corner, select an option.

The options are:

- **Increase By Percentage:** Increases the prices of the selected items by a specific percentage.
- **Decrease By Percentage:** Decreases the prices of the selected items by a specific percentage.
- **Increase By Amount:** Increases the prices of the selected items by a certain sum.
- **Decrease By Amount:** Decreases the prices of the selected items by a certain sum.
- **Set Amount:** Sets the prices of the selected items to a specific sum.
- **Set Quantity:** Allows Tekla EPM to only use a specific number of the selected lengths.
- **Set Lengths:** Allows you to add lengths for the selected items either one by one or as a range.

- **Set Lengths (No Price):** Allows you to add lengths for the selected items either one by one or as a range. No pricing information is added.

New fields appear at the bottom of the dialog box.

7. Modify the values in the fields according to your needs.
8. Click **Save**.
9. To close the dialog box, click the **Close** button (X) in the upper-right corner.

The changes are saved for all selected material grades and dimensions. Now, you need to recombine the materials

### **Example: Change combining lengths of angles**

In this example, we will modify all angles so that the only available length for combining is 20 inches.

1. In the **Shape** list at the top of the **Pricing Global Edit** dialog box, select **L**.
2. Click the double arrow buttons to move all grades and dimensions to the **Included** list.
3. Select the **Set Lengths** option button.
4. Click **New**.
5. Leave the **Quantity** field blank to allow Tekla EPM to use an unlimited quantity of the length.
6. **Length** field, enter 20'0".
7. In the **Normal Price** field, enter a price.  
For example, set the price to \$25,50/CWT.
8. Click **Add**.
9. Click **Save**

Now, the only angle length available in recombining is 20'0".

### **See also**

[Recombine all items \(page 32\)](#)

[Recombine items of a shape \(page 33\)](#)

[Recombine items of a material grade \(page 34\)](#)

[Recombine a material dimension \(page 34\)](#)

[Update combining information and recombine all items \(page 35\)](#)

## Recombine all items

If the combining results need to be changed to fit specific material applications, such as different material lengths or plate sizes, you need to recombine items. The **Recombine All** command recombines all items in the previous combining run.

1. In the **Combining Run Results** dialog box, click the **Combining Run** ribbon tab.
2. In the menu, select **Recombine All**.
3. In the first confirmation dialog box, click **Yes** to recombine all items.
4. In the second confirmation dialog box, click **Yes** to save the previous combining run or **No** to recombine materials without saving the combining run.

By saving the previous combining run, you can compare the differences between the previous combining run and the new one.

Tekla EPM performs the combining run and reloads the information that you selected. The materials recombine to the lengths changed in **Run-Specific Pricing Maintenance**.

## Recombine items of a shape

To recombine materials after adding new items, use the **Recombine Shape** command in the **Combining Run Results** dialog box.

1. In the **Combined** navigation tree, click the **+** sign to show available material shapes.
2. Click the material shape to which you have added items.  
Only the items of the selected shape are shown.
3. Click the items that you want to recombine to select them.  
To select multiple items, hold down **Ctrl**.  
To select a range of subsequent items, hold down **Shift**.
4. Click the **Combining Run** ribbon tab.
5. In the menu, select **Recombine Shape**.
6. In the first confirmation dialog box, click **Yes** to recombine the selected shape.
7. In the second confirmation dialog box, click **Yes** to save the previous combining run or **No** to recombine materials without saving the combining run.

By saving the previous combining run, you can compare the differences between the previous combining run and the new one.

Tekla EPM recombines the selected items.

## Recombine items of a material grade

To recombine materials after changes have been made to material grades, use the **Recombine Grade** command in the **Combining Run Results** dialog box.

1. In the **Combined** navigation tree, click the **+** sign under a material shape to show available material grades.
2. Click a material grade to select it.  
Only the selected material grade is shown.
3. Click the items that you want to recombine to select them.  
To select multiple items, hold down **Ctrl**.  
To select a range of subsequent items, hold down **Shift**.
4. Click the **Combining Run** ribbon tab.
5. In the menu, select **Recombine Grade**.
6. In the first confirmation dialog box, click **Yes** to recombine the selected grade.
7. In the second confirmation dialog box, click **Yes** to save the previous combining run or **No** to recombine materials without saving the combining run.

By saving the previous combining run, you can compare the differences between the previous combining run and the new one.

Tekla EPM recombines the selected items.

## Recombine a material dimension

When changes have been made to a material dimension in the combining material list, use the **Recombine Size** command to recombine the dimension. Note that you need to have the **Combining Run Results** dialog box open.

1. In the **Combined** navigation tree, click the **+** sign, and select a material dimension.  
Only the selected material dimension is shown.
2. Click the **Combining Run** ribbon tab.
3. In the menu, select **Recombine Size**.  
A confirmation dialog box appears, asking if you want to recombine the selected dimension.
4. In the first confirmation dialog box, click **Yes** to recombine the selected dimension.

5. In the second confirmation dialog box, click **Yes** to save the previous combining run or **No** to recombine materials without saving the combining run.

By saving the previous combining run, you can compare the differences between the previous combining run and the new one.

Tekla EPM recombines the selected material dimension.

## Update combining information and recombine all items

When new materials have been added, or material pricing has changed, use the **Reload Information & Recombine All** command. Tekla EPM will then update the material and pricing information and perform a new combining run.

Note that all run-specific information will be lost if you use the **Reload Information & Recombine All** command.

1. In the **Combining Run Results** dialog box, click the **Combining Run** ribbon tab.
2. In the menu, select **Reload Information & Recombine All**.

A confirmation dialog box appears, asking if you want to recombine all items.

3. In the first confirmation dialog box, click **Yes** to confirm recombining all items.
4. In the second confirmation dialog box, click **Yes** to save the previous combining run or **No** to recombine materials without saving the combining run.

By saving the previous combining run, you can compare the differences between the previous combining run and the new one.

5. In the third confirmation dialog box, click **Yes** to reload and update the items to be recombined, or **No** to not reload and update the items.
6. In the fourth confirmation dialog box, click **Yes** to reload and update the pricing information, or **No** to keep the current pricing information.

Tekla EPM performs the combining run and reloads the information that you selected.

## Compare combining runs

You can view and compare the changes that were made from one combining run to another. This is useful for comparing drops for the use of different stock lengths or pricing differences between two vendors.

Note that you must have saved a previous combining run to compare it with the current combining run.

1. In the **Combining Run Results** dialog box, click the **Combining Run** ribbon tab.
2. In the menu, select **Compare With a Previously Saved Run**.
3. In the **Select Combining Run** dialog box, click a previously saved combining run in the list to select it.
4. Click **Compare**.  
The **Combining Run Compare** dialog box opens, displaying the information of both combining runs. Any differences are marked with an asterisk (\*).
5. In the navigation tree in the left-hand pane, click a material size to select it.
6. View the differences for the size in the different combining runs.
7. To close the comparison view, click the **Close** button (X) in the upper-right corner of the **Combining Run Compare** dialog box.

## 2.7 Load combining items into purchasing

Load materials in a bill of materials into a requisition or a purchase order, so that they can be purchased. You can either load all combining items into a requisition or a purchase order, or select the items that you want to load.

Note that Tekla EPM only allows you to load the same materials into purchasing once.

When the materials are sent to purchasing, Tekla EPM populates the reference number for both the combining job items and the purchasing items. However, the combining items and the purchasing items are not linked.

### See also

[Load all combining items into a requisition \(page 37\)](#)

[Load selected combining items into a requisition \(page 37\)](#)

[Load all combining items into a purchase order \(page 38\)](#)

[Load the selected combining items into a purchase order \(page 39\)](#)

## Load all combining items into a requisition

To load all items in a bill of materials into a requisition, use the **Load Material Into Requisition** command.

1. In the **Combining** dialog box, click the **Combining** ribbon tab.
2. In the menu, select **Purchasing --> Load Material Into Requisition**.
3. In the **Select Requisition** dialog box, select a requisition and click **OK**.  
If necessary, you can also create a new requisition and load the items into it.
4. Click **OK**.
5. In the **Purchasing Import Filters**, do one of the following:

| To  | Do this  |
|---|--|
| Load all items                                | <ul style="list-style-type: none"><li>• Click <b>Import</b>.</li></ul>   |
| Filter out items that you do not want to load | <ol style="list-style-type: none"><li>a. On the left side of the dialog box, select a filter type in the <b>Type</b> list, and click <b>Select</b>.</li><li>b. Click <b>Select</b>.</li><li>c. Click the arrow buttons to move the items that you want to load to the requisition to the <b>Included</b> list.<br/>The items on the <b>Not Included</b> side will not be sent to purchasing.</li><li>d. Repeat the process for different filter types until you have filtered out all unnecessary items.</li><li>e. Click <b>Import</b>.</li></ol> |

6. In the **Import Items** dialog box, click **OK** to return to the **Combining** dialog box.

Items are sent to the selected requisition. To view and use the requisition, open the **Purchasing** module and go to the **Requisitions** tab.

## Load selected combining items into a requisition

Use the **Load Selected Material Into Requisition** command to select the items in a bill of materials that you want to load into a requisition.

1. In the **Combining** dialog box, select the items that you want to load.  
To select multiple items, hold down **Ctrl**.  
To select a range of subsequent items, hold down **Shift**.
2. Click the **Combining** ribbon tab.

3. In the menu, select **Purchasing --> Load Selected Material Into Requisition** .
4. In the **Select Purchase Order** dialog box, select a purchase order and click **OK**.  
If necessary, you can also create a new purchase order and load the items into it.
5. Click **OK**
6. Click **OK** to close the **Import Items** dialog box.

Items are sent to the selected requisition. To view and use the requisition, open the **Purchasing** module and go to the **Requisitions** tab.

### Load all combining items into a purchase order

Use the **Load Material Into Purchase Order** command to load all items in a bill of materials into a purchase order.

1. In the **Combining** dialog box, click the **Combining** ribbon tab.
2. In the menu, select **Purchasing --> Load Material Into Purchase Order** .
3. In the **Select Purchase Order** dialog box, select a purchase order and click **OK**.  
If necessary, you can also create a new purchase order and load the items into it.
4. Click **OK**
5. In the **Purchasing Import Filters**, do one of the following:

| To  | Do this  |
|---|--|
| Load all items                                | <ul style="list-style-type: none"> <li>• Click <b>Import</b>.</li> </ul>   |
| Filter out items that you do not want to load | <ol style="list-style-type: none"> <li>a. On the left side of the dialog box, select a filter type in the <b>Type</b> list, and click <b>Select</b>.</li> <li>b. Click <b>Select</b>.</li> <li>c. Click the arrow buttons to move the items that you want to load to the requisition to the <b>Included</b> list.<br/>The items on the <b>Not Included</b> side will not be sent to purchasing.</li> <li>d. Repeat the process for different filter types until you have filtered out all unnecessary items.</li> <li>e. Click <b>Import</b>.</li> </ol> |

- Click **OK** to close the **Import Items** dialog box.

Items are loaded into the selected purchase order. To view and use the purchase order, go to the **Purchasing** module and open the **Purchase Orders** tab.

### Load the selected combining items into a purchase order

Use the **Load Selected Material Into Purchase Order** command to select the items in a bill of materials that are loaded into a purchase order.

- In the **Combining** dialog box, select the items that you want to load.  
To select multiple items, hold down **Ctrl**.  
To select a range of subsequent items, hold down **Shift**.
- In the menu, select **Purchasing --> Load Selected Material Into Purchase Order**.
- In the **Select Purchase Order** dialog box, select a purchase order and click **OK**.  
If necessary, you can also create a new purchase order and load the items into it.
- Click **OK**.
- Click **OK** to close the **Import Items** dialog box.

Items are loaded into the selected purchase order. To view and use the purchase order, go to the **Purchasing** module and open the **Purchase Orders** tab.

## 2.8 View all changes in a combining job

To see all changes that have been made to the data in a combining job, you can create a specific type of report, called **List Of Changes**.

- In the **Combining** dialog box, click the **Combining** ribbon tab.
- In the menu, select **List Of Changes**.
- In the **Report Filter** dialog box, do any of the following according to your needs:

| To                     | Do this  |
|------------------------|--|
| Filter changes by user | a. Click <b>Edit</b> on the right side of the <b>User</b> section. |

| To                     | Do this   |
|------------------------|---|
|                        | b. Click the arrow buttons to move the users whose changes you want to view to the <b>Included</b> list.<br>c. Click <b>OK</b> .                              |
| Filter changes by date | a. Click <b>Edit</b> on the right side of the <b>Date</b> section.<br>b. Enter the start ( <b>Min</b> ) and end ( <b>Max</b> ) dates.<br>c. Click <b>OK</b> . |

- Click **Make Report**.
- In the **Report Progress** dialog box, do one of the following:

| To                        | Do this   |
|---------------------------|---|
| View the list of changes  | <ul style="list-style-type: none"> <li>Click <b>View</b>.</li> </ul> <p>The report opens in <b>Tekla EPM Report Viewer</b>.<br/>           You can use the <b>Email Excel</b> and <b>Email PDF</b> buttons at the top of the <b>Tekla EPM Report Viewer</b> window to email the report via Microsoft Outlook.</p> |
| Print the list of changes | a. Change the number of the printed copies by clicking the + and - buttons.<br>b. Click <b>Print</b> .<br>c. In the <b>Select Printer</b> dialog box, click a printer to select it.<br>d. Click <b>OK</b> .   |

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

## 2.9 Export a combining job to KISS

One way to save a combining job for later use is exporting it to KISS.

- In the **Combining** dialog box, click the **Combining** ribbon tab.
- In the menu, select **Export to KISS**.
- 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.

- If necessary, modify the file name.

5. Click **Save**.

A copy of the file is saved in the KISS format.

## 2.10 View and print combining reports

You can view and print reports associated with the combining job. You can create different kinds of reports and filter the items in the reports in several ways.

1. In the **Combining** dialog box, click the **Combining** ribbon tab.
2. In the menu, select **Reports**.  
The **Report Filters** dialog box opens.
3. To only include specific materials 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, click the arrow buttons to move the material items that you want to include in the reports to the **Included** list.
5. Click **OK**.  
To further limit the included items, repeat steps 3 to 5 for all necessary filter types in the **Report Filters** dialog box.
6. Click **Make Report**.
7. In the **Report Selection** dialog box, click the report that want to create.
8. Do one or both of the following:

| To               | Do this  |
|------------------|--|
| View the report  | <ul style="list-style-type: none"><li>• Click <b>View</b>.<br/>You can use the <b>Email Excel</b> and <b>Email PDF</b> buttons at the top of the <b>Tekla EPM Report Viewer</b> window to email the report via Microsoft Outlook.</li></ul>  |
| Print the report | <ol style="list-style-type: none"><li>a. Change the number of the printed copies by clicking the <b>+</b> and <b>-</b> buttons.</li><li>b. Click <b>Print</b>.</li><li>c. In the <b>Select Printer</b> dialog box, click a printer to select it.</li><li>d. Click <b>OK</b>.</li></ol> |

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



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