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# BOM Settings Manager User Guide

BOM Settings Manager is a product of PROCAD software. It is designed for use with PROCAD SPOOLCAD's products.

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# About BOM Settings Manager

Use the BOM Settings Manager to create templates for the Bill of Material.

Use the settings options to:

- Organize BOM information in appropriate tables
- Sort items according to user defined criteria
- Select a numbering system
- Change display fonts
- Alter BOM size and column spacing
- Save your template information for project applications

## Elements of the BOM

All of the BOM features itemized here can be customized including:

- Order BOM items are listed
- Fields that are displayed in the BOM
- Units and fonts used in the BOM
- BOM Title
- How BOM items are grouped

Fields	Quantities	Sizes, all in units	BOM Title	Group Name/Group Header		
Number	Quantity	Length	Size	Schedule	Description	Material
1	85	3,175mm	32mm	XXS	ANSI Piping Pipe Flex Hose Connectors	SS
2	98	4,835mm	450mm	SCH.80	ANSI Piping Pipes	CS A420 GR. WPL6
Flanges						
3	23	6,045mm	5mm	STD	ANSI Piping Flanges	STL
4	41	4,694mm	90mm	XXS	ANSI Piping Welds	1 1/4 CR - 1/2 MOLY
Fittings						
5	72	3,800mm	10mm	XS	ANSI Piping Elbows	CS A105

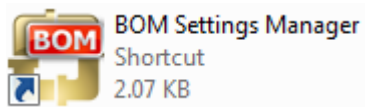
# Navigating BOM Settings Manager

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## Starting BOM Settings Manager

To start *BOM Settings Manager*, double-click on the ***BOM Settings Manager*** shortcut in the PROCAD SPOOLCAD folder on your desktop.


SPOOLCAD




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## Definitions

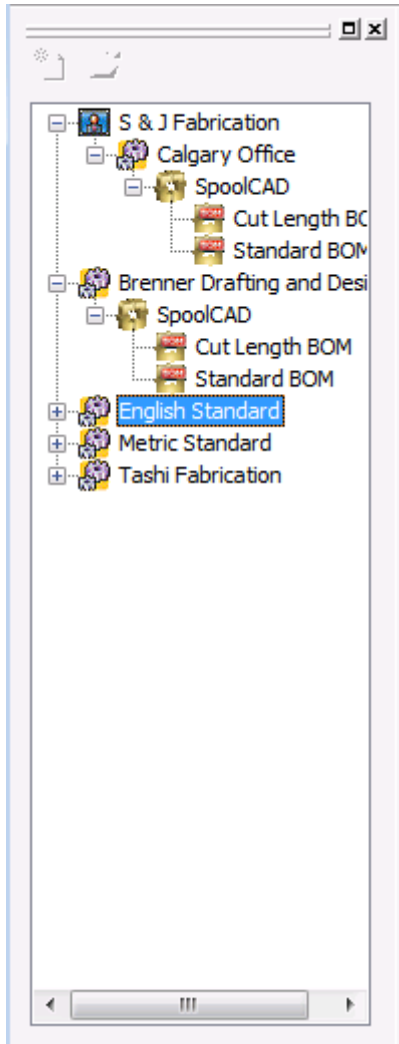
To effectively use the BOM Settings Manager, it is important to understand the concepts of a Client and a Standard.

**Standard** – One standard consists of one or more drawings. Each standard may have the same settings globally applied to all of its drawings through the standard manager. Standards appear as  in the tree diagram to the left of the Spec Generator.

**Client** - One client consists of one or more standards. Clients appear as  in the tree diagram to the left of the Spec Generator

**Application Folders** – Each Standard contains multiple folders organizing the multiple BOM templates according to piping applications.

This configuration of drawings, standards and clients can be seen in the example below. In this example, work is being performed on behalf of two companies, S&J Fabrication and Brenner Drafting and Design. At S&J Fabrication, drawings are being produced for Calgary office locations while Brenner Drafting and Design has only one location.




# Procedures

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## Opening an Existing Template

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*To open an existing template...*


1. Select the standard that has the template you want to open.
2. Select the application you want.
3. Select the desired template file from the application folder.
4. To open the template you may:
  - Double click on the template name.
  - Click the **Open** button from the button bar. 
  - Right click on the template name and select **Open** from the context menu.

The selected template file opens in *BOM Settings Manager*.

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## Creating a New Template

*To create a new template...*

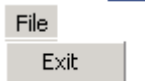
1. Select the standard that you want to create a new template for.
2. Select the application that you wish to create a new template for.
3. To create a new template you may:
  - Click the **New** button from the button bar. 
  - Right click on the application folder name and select **New** from the context menu.
4. Open the template.

All fields are reset to default values.
5. Modify the template as required.
6. Click **Save**.

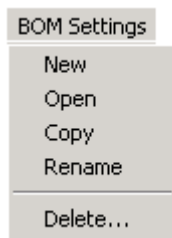


## BOM Settings Manager Menus

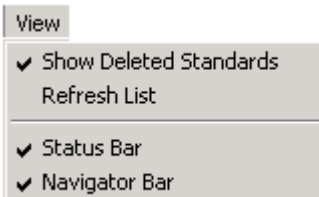
You can access the following menu commands from BOM Settings Manager's main window.



Use this command...	To...
Exit	Exit the BOM Settings Manager



Use this command...	To...
New	Create a new BOM template for the selected application and standard.
Open	Open the highlighted BOM template for editing.
Copy	Copy the highlighted BOM template into the same application folder.
Rename	Rename the highlighted BOM template to a new unique name.
Delete	Delete the highlighted BOM template. A confirmation message will appear after selecting this option.



Use this command...	To...
Show Deleted Standards	Shows drawings standards in the navigation pane that have been deleted but not yet purged from the system.
Refresh List	Refreshes the list of clients and standards in the navigation pane.

Status Bar	
Navigator Bar	Shows / hides the navigation pane.

**Window**

Cascade
Tile
Arrange Icons
✓ 1 XYZ Engineering \ Houston office \ Ortho \ New BOM Settings 1

Use this command...	To...
Cascade	Cascade all open component group windows
Tile	Tile all open component group windows
Close All	Close all open component group windows
Currently open windows	This is a list of all windows currently open. The check mark indicates the currently active window.

**Help**

Help...
About BOM Settings Manager...

Use this command...	To...
Help	Open the Help file
About BOM Settings Manager	View information about BOM Settings Manager

# Templates and Layouts

## Creating a Template: Introduction

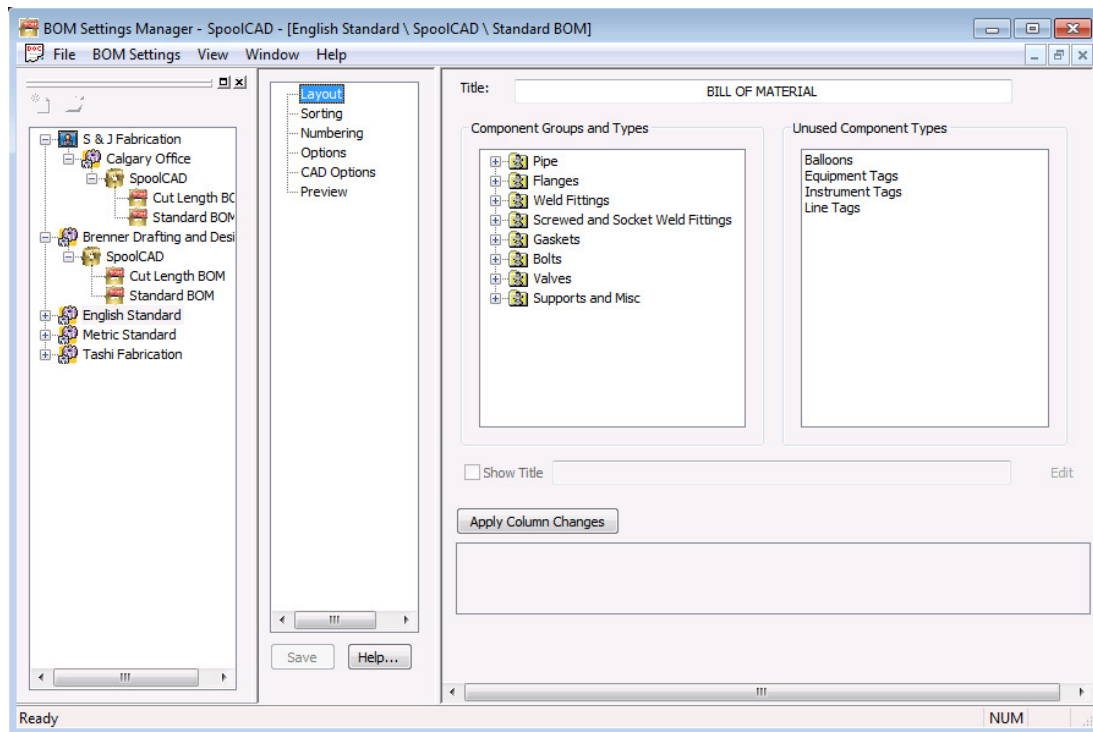
BOM Setting Manager is shipped with default BOM templates.

## Defining Layout: Introduction

The template layout options allow you to control how information is presented in the BOM. Layout options allow you to:

- Organize component types into logical groups and decide what information to display for each group
- Assign group table order
- Assign column order within the tables
- Define other layout options including BOM name, BOM column spacing, column justification, and inserting a blank column

If you are creating a new template, review sections called **Defining Layout**.



## Creating Component Groups

Component groups are the primary element of BOM organization. This procedure describes how to:

- Create component groups and add all associated component types
- Select the information to display for each component group

### *To create and define a component group...*

1. Click the **Layout** dialog box.
2. To create a New Group, right click in the box beneath **Component Groups and Types** and select **New**. You will then be able to name the group. If at any time you want to change the group's name, right click on the group and choose **Rename** from the menu, or do a slow double click on the group's current name.
3. There are three ways to add component types to the new group:
  - Right click on the group, select **Insert**, and then choose the Component Type you want to add from the menu.
  - Highlight the group you are working with, right click on the Component Type you want to add, and then click on **Add Selection**.
  - Highlight the group you are working with, and then double click the Component Type you want to add, which will add it to the group.

➤ **Note:** You can't have a component group in more than one folder. Once a type is used, it will disappear from the list, but it can be moved to a different group if desired.
4. Select the data you want to display for the new group in the BOM table as follows:
  - At the bottom of the dialog box the default fields are displayed for each group.
  - You can right click on the fields to **Add** or **Delete**. Depending on the location of the arrow determines where the new field will be inserted.
5. Repeat Step 2-4 for each component group required for the template.
6. Proceed with **Assigning Table and Field Order**.

## Assigning Table Order

Each component group defined in the procedure called **Creating Component List** appears as a separate table in the BOM. Use the following procedure to assign the order that component group tables appear in the BOM.

- **Note:** To perform this procedure you must have at least two component groups in your template.

### *To assign group table order...*

1. Click the **Layout** dialog. The **Component Groups and Types** list all the currently defined groups in the template.

2. To change the order of the groups, click the group you want to move, and then drag and drop it in the location you want it to be.
3. Repeat the previous step for each group table you want to reorder.
4. Proceed with **Assigning Field Order in Tables**.

### Assigning Field (Column) Order in Tables

Each component group defined in the procedure called **Defining Layout 1: Creating Component Groups** appears in a separate table in the BOM. Each group table has designated fields represented by columns in the table. Use this procedure to order the columns within a group table

- **Note:** To perform this procedure you must have a component group that has at least two data fields assigned.

#### *To assign field (column) order...*

1. Click the **Layout** dialog. The **Component Groups and Types** list all the currently defined groups in the template.
2. In the **Component Groups and Types** list, click the group you want to organize. The bottom of the dialog box displays all the fields currently assigned to the group's BOM table.
3. To change the column order, select the item you want to move, then drag and drop it in the location you want.
4. Repeat the previous step for each field item you want to reorder.
5. Proceed with Defining **Assigning Other Layout Options**.

### Assigning Other Layout Options

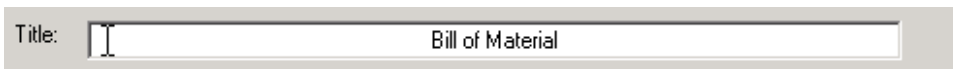
To change the look of your BOM you can modify these items:

- BOM title
- Column width and justification for each field

Before you perform this procedure, ensure you create all the required component groups and assign the required fields to each group.

#### *To change the BOM title...*

1. Click the **Layout** dialog.
2. Check the **BOM Title** field. The default title is **Bill of Material**.

A screenshot of a software dialog box. On the left, the text 'Title:' is followed by a small icon of a text box. To the right of this is a large rectangular text input field. Inside the field, the text 'Bill of Material' is displayed. The entire dialog box has a light gray background.

3. To change this title, select and delete the current text, then replace with the desired name.

Title:

### *To modify column widths...*

You must assign column widths for all of the **Field** items assigned to each group. Column width values are expressed as a percentage of the total width available.

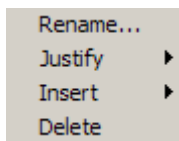
1. To modify the column widths, place the cursor in between two of the fields. When the double arrow cursor appears, you are able to either shrink or expand the width of the field, which automatically adjusts the other field widths.
2. The percentages associated with each field are how much of the page each field takes up. When adjusting the field widths, keep in mind that the maximum total of all fields is 100%.
3. Column text wraps automatically.

### *To modify column justification...*

1. Right click on the field you want to change. Select **Justification** from the menu, and then choose how you would like the field to appear in the BOM.
2. Repeat steps for each field in the group.
3. Ensure you assign column and justification values for all groups in the BOM.
4. For information on changing overall BOM width, see **Changing BOM Size and Spacing**.

### *To insert a blank column with a user defined heading...*

1. Click the **Layout** dialog.
2. Move the mouse cursor over the Field Display Order list. Right click and the following menu will appear:



3. From the **Insert** menu, select **\*New User Custom Field\***.
4. Rename the column using the **Rename** command.

## **Sorting Table Information**

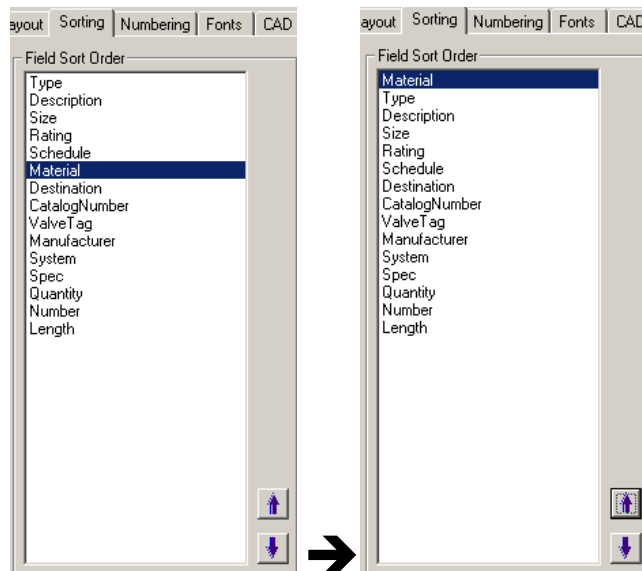
Use this procedure to change the way items are sorted and listed in the BOM tables.

For example, if the first three items in the **Field Sort Order** list are: type, size, and material, then each table in the BOM is sorted as follows.

All items of the same **type** are grouped together (all elbows for example). All the elbows in the list will be sub-grouped by size, and then every size of elbow will be sub-grouped by material. You can change groupings by changing the **field sort order**.

*To change field sort order...*

- Click the **Sorting** dialog. The fields display current settings. If you are creating a **New** template, the default settings appear.
  - Examine the **Field Sort Order** list. This list defines the sorting hierarchy for all the tables in the BOM. For example, if the first item in the list is Size, all BOM tables will be initially sorted by item size.
    - **Note:** The items in the field sort order list are derived from the component database. You cannot add items to this list, or delete items. If required, you can change item names using the **Layout** tab.
3. Click the sort item you want to move. The **up** and **down** arrow buttons at the bottom of the list become active.
  4. Use the **up** and **down** buttons to move the selected item to the desired position.



5. If required, click the **Sort by Destination** check box. If you check this box, the system creates separate BOM tables for each destination.

## Numbering BOM Items

You can alter the item numbering in the BOM by changing one of more of these parameters:

- The start number for the first group in the BOM
- The starting number for subsequent groups

- The minimum number of unused numbers between groups

The **Numbering** dialog contains a graphical interface that automatically updates to reflect your current numbering selections.

***To change item numbering...***

1. Open the BOM template you want change.
  - **Note:** If you are creating a new BOM template, click the **New** button.
2. Click the **Numbering** dialog. The fields display current settings. If you are creating a **New** template, the default settings appear.
3. To change the first item number in the first table of the BOM, modify the **Start number** field.
  - **Note:** "1" is the minimum value.
4. To change the starting number for subsequent groups, modify the **Round to** number. The value entered represents the starting multiple for all but the first group in the BOM. For example, if you set **Round to** 100, numbering for every group in the BOM begins with a multiple of 100 (except the first group).
5. To change the minimum number of unused numbers between groups, change the **Min. Offset** value. The value entered here represents the minimum number of unused numbers between groups. For example, if the **Min. Offset** is 20, there will be a minimum of 20 unused values between the last item in the first group and the first item of the second group.
  - **Tip:** If you alter both **Round to** and **Min. Offset** settings, be aware that **Min. Offset** values will work in conjunction with the **Round to** values. Use the graphical interface to verify that values are generating the desired result.
6. When you have redefined the numbering criteria, do one of the following:
  - Click **Save** to save changes in the current template.
  - Click **Save As** to save changes in a new template.

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## Changing Fonts

You can change the font, type size, and style for all the elements in the BOM including:

- BOM title (the main title)
- Group Header (title for tables in the BOM)
- Field Heading (table headings)
- BOM Item (all list items)



### *To change font, type size, and style...*

1. Click the **Options** dialog. The fields display current settings. If you are creating a **New** template, the default settings appear.
2. Click the font button for the BOM item you want to change.  
  
The **Font** dialog box appears. It displays lists for font, styles, and size.
3. Using the list boxes, select the font, style, and size for the BOM item selected in Step 2.
4. Click **OK** to close the **Font** dialog box. The new selections appear in the **Options** dialog **BOM Settings Manager**.
  - **Note:** The **Font** dialog box displays a list of all fonts, styles, and sizes available on your system. Not all are compatible with AutoCAD. For best results, select standard fonts (Arial, and Times Roman for example).
5. Repeat Step 2 - 4 for each BOM item you want to change.
6. When you have redefined the BOM font styles, do one of the following:
  - Click **Save** to save changes in the current template
  - Click **Save As** to save changes in a new template

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## Changing Units

You can change the units to use for the BOM. Units refer to the length and coordinates information used to place components.

- **Note:** The BOM width, height, and spacing units are changed using the Units option.

### *To change units...*

1. Click the **Options** dialog of the BOM Settings Manager.
2. Select either millimeters or inches. The BOM's width, height, and spacing will be displayed in the format of the selected units.

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## Changing BOM Size and Spacing

You can change the following size parameters of the BOM for AutoCAD placement:

- Width
- Height
- Column spacing

- **Note:** Changes you make to BOM size settings alter the final AutoCAD size of the BOM.

### *To change size and spacing...*

1. Click the **CAD Options** dialog. The fields display current settings. If you are creating a **New** template, the default settings appear.
  2. Change the values in any of these fields as required.
  3. When you have redefined the BOM size and spacing, do one of the following:
    - Click **Save** to save changes in the current template
    - Click **Save As** to save changes in a new template
- **Note:** For information on using the **Working Units** drop-down list, see **Changing Units**.

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## Modifying/Deleting Templates

### Modifying a BOM Template

You can modify a BOM template at any time, however BOMs created using the old template will not automatically update the reflect changes.

To modify this BOM item...	Use this dialog...	Consult this Help topic...
BOM title	Layout	Defining Layout 4: Assigning Other Layout Options
Rename table in BOM	Layout	Layout Dialog
Delete table from BOM	Layout	Layout Dialog
Table order in BOM	Layout	Defining Layout 2: Assigning Table Order
Component groups contents	Layout	Defining Layout 1: Creating Component
Table column contents	Layout	Defining Layout 1: Creating Component Groups
Table column width	Layout	Defining Layout 4: Assigning Other Layout Options
Text justification for a column	Layout	Defining Layout 4: Assigning Other Layout Options
Group/table name	Layout	Defining Layout 1: Creating Component Groups
Column order in tables	Layout	Defining Layout3: Assigning Field (Column) Order

Field/column name	Layout	Defining Layout 1: Creating Component Groups Layout Dialog
Font size and style (any table item)	Options	Changing Fonts
Sort order within tables	Sorting	Sorting Table Information
Units displayed in the BOM	Options	Changing Units
Dimensions of the BOM	CAD Options	Changing BOM Size and Spacing
Numbering of table items	Numbering	Numbering BOM Items

## Deleting a Template

Use this procedure to delete a template file.

### *To delete a template...*

1. Select the standard that has the template you want to delete.
2. Select the application you want.
3. Select the desired template file from the application folder.
4. To delete the template you may:
  - Select **Delete** from the **BOM Settings** menu.
  - Right click on the template name and select **Delete** from the context menu.
5. Confirm that you wish to delete the selected template.

# Dialog Boxes

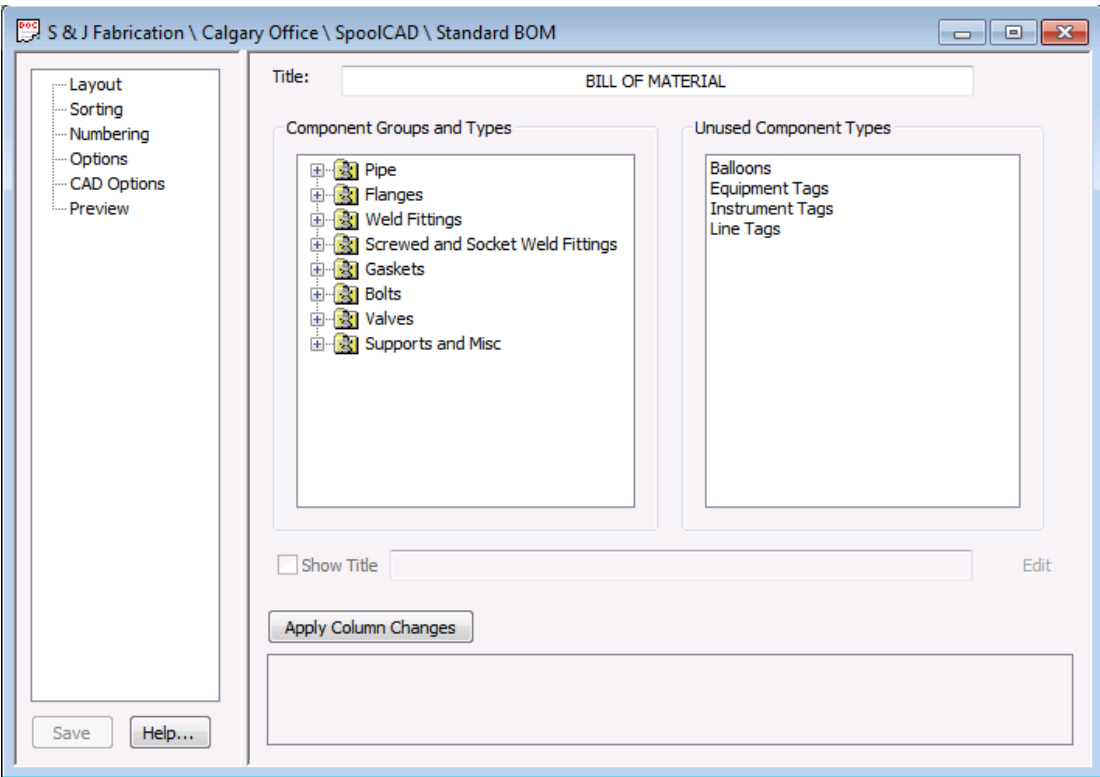
## Layout Dialog

Use this dialog to perform most of the critical tasks in creating a BOM template, such as:

- Organizing components into table groupings
- Determining the order of tables in the BOM
- Defining table column contents (fields)
- Defining column order in the tables
- Determining table width and column justification
- Assigning a BOM name

*To access this dialog...*

Click the **Layout** dialog in the **BOM Setting Manager** dialog box.



In this field	Enter/do this...
BOM Title	Type a new title to appear at the top of the BOM

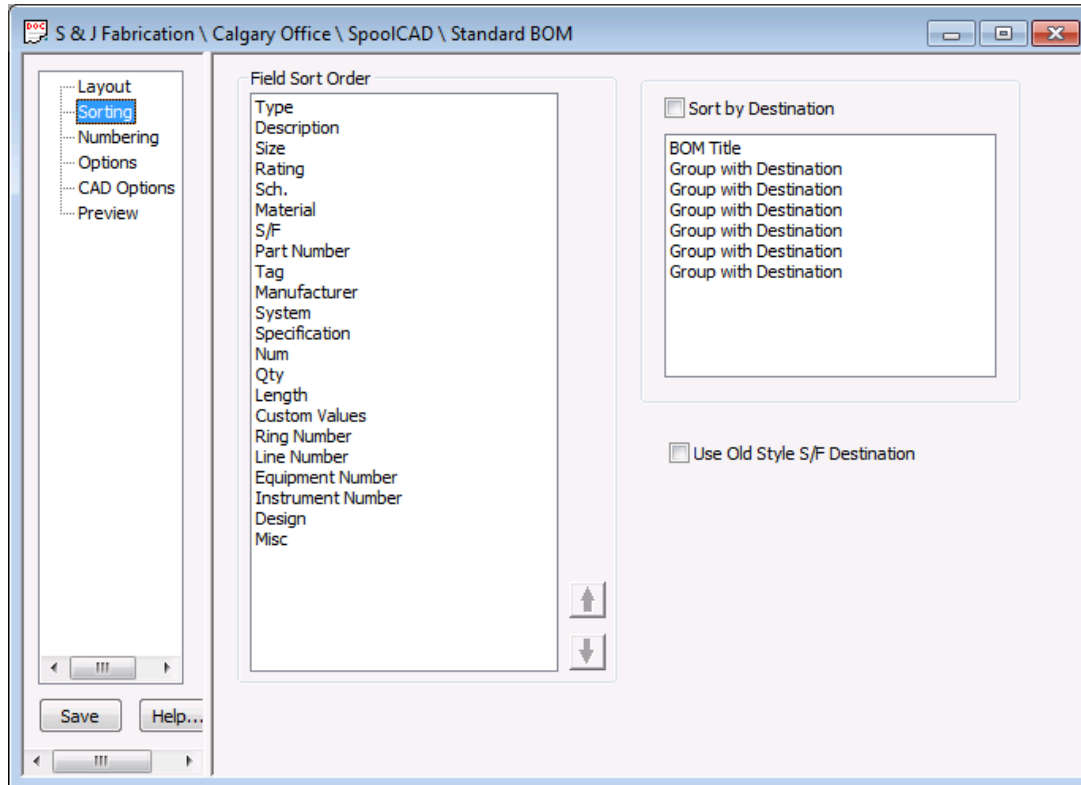
Group Display Order list	<p>This list displays all groups in the BOM. The order that groups appear here is the order they will appear, as tables, in the BOM.</p> <p>To change the order position of a list item, click it, then drag and drop it in the location you want.</p>
Component Types	<p>This is a list of all component types in the database. Use this list to assign component types to a component group. To assign a component type to a component group, click the group name. The component type list becomes active. Click the component types you want to include in the group.</p> <p><b>Note:</b> All selected items remain highlighted. To deselect an item, click it again.</p>
Show Title	<p>Check this box to display the title of the selected group in the BOM. If you wish to hide the group title, uncheck this box by right-clicking it.</p>
Width	<p>Select an item in the Field Display Order list, and then drag one side of the column to increase or decrease the relative size. This value determines the width of the field column in the BOM.</p> <p>Widths are expressed as a percentage of the total width of the BOM. Therefore, a value of 25 means the column will take up 25% percent of the BOM width.</p> <p>To save the column changes, use the apply column changes button provided.</p>
Apply Column Changes	<p>After adjusting the column width, use the apply column changes to save changes to the column fields.</p>
Justification	<p>Select an item in the Field Display Order list, and then click one of the radio buttons.</p> <p>If you click <b>Left</b>, column text for the selected item will be left aligned. If you click <b>Center</b>, the column text for the selected item will be centred in the column.</p>

## Sorting Dialog

Use this dialog to change the way items are sorted and listed in the BOM tables.

*To access this dialog...*

Click the *Sorting* dialog in the *BOM Setting Manager* dialog box.



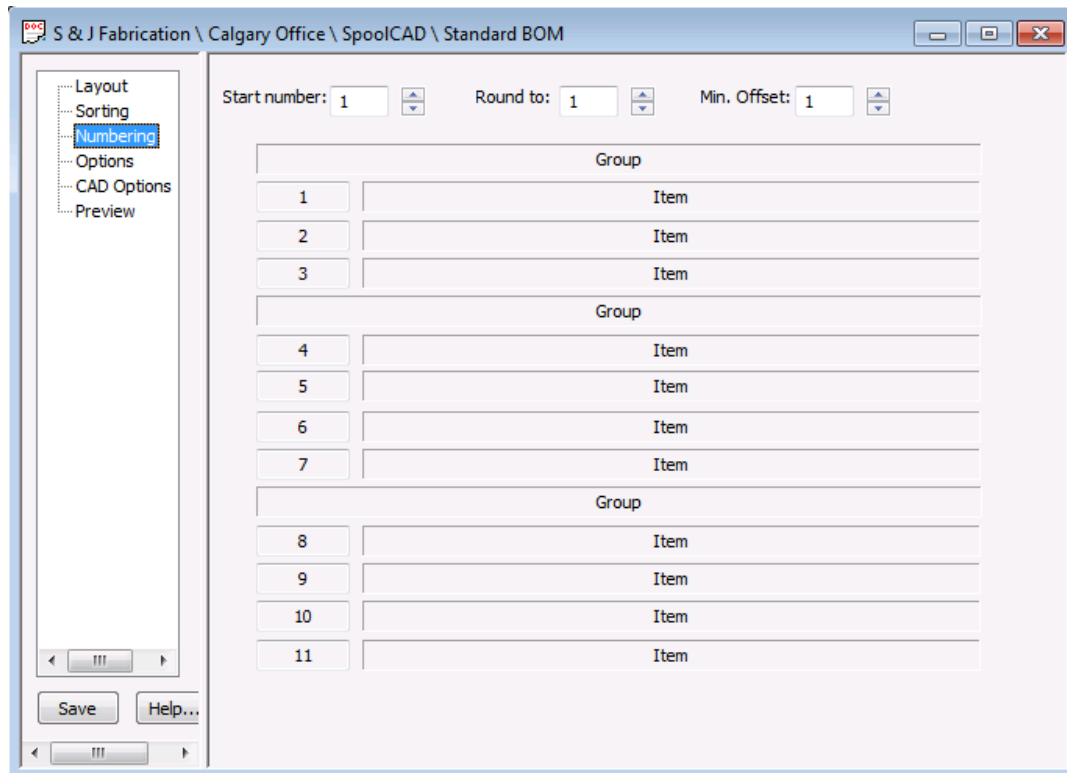
In this field	Enter/do this...
Fields Sort Order	<p>This list displays all the fields available for inclusion in the BOM tables.</p> <p>The order they appear in this list is the order that items will be sorted within each table of the BOM.</p> <p>For example, if the first three items in the Field Sort Order list are: type, size, and material, then each table in the BOM is sorted as follows.</p> <p>In a group called <b>Fittings</b>, all items of the same <b>type</b> are grouped together (all tees for example). All the tees in the list will be sub-grouped by <b>size</b>, and then every size of tee will be sub-grouped by <b>material</b>.</p> <p><b>To change the order of items into the Field Sort Order list...</b></p> <ol style="list-style-type: none"> <li>1. Click the item you want to move.</li> <li>2. Use the up and down arrows to move it to the location you want.</li> </ol>
Sort by Destination Check Box	<p>Activate this check box to sort all groups and items by destination.</p> <p>For example, the group called <b>Fittings</b> contains some components that have a <b>Shop</b> destination and some that have a <b>Field</b> destination.</p> <p>If you activate the <b>Sort by Destination</b> option, the BOM will create separate <b>Shop: Fittings</b> and a <b>Field: Fittings</b>. If you do not activate the <b>Sort by Destination Option</b>, all <b>Fittings</b> will appear in a single table.</p>
Sort by Destination List	<p>This list is a graphical representation of <b>Sort by Destination</b> toggle.</p>

## Numbering Dialog

Use this dialog to change the way items are numbered in the BOM tables.

### *To access this dialog...*

Click the *Numbering* dialog in the *BOM Setting Manager* dialog box.



In this field	Enter/do this...
Start number	Use this field to change the <i>first</i> item number in the <i>first</i> table of the BOM. <i>Note:</i> "1" is the minimum value.
Round to	Use this field to change the starting multiple for all but the first group in the BOM. For example, if you set <b>Round to</b> 100, numbering for every group in the BOM begins with a multiple of 100 (except the first group).
Min. Offset	Use this field to change the minimum number of unused numbers between groups. For example, if the <b>Min. Offset</b> is 20, there will be a minimum of 20 unused values between the last item in the first group and the first item of the second group.
Numbered tables	These tables are a graphical representation of the currently selected numbering options.



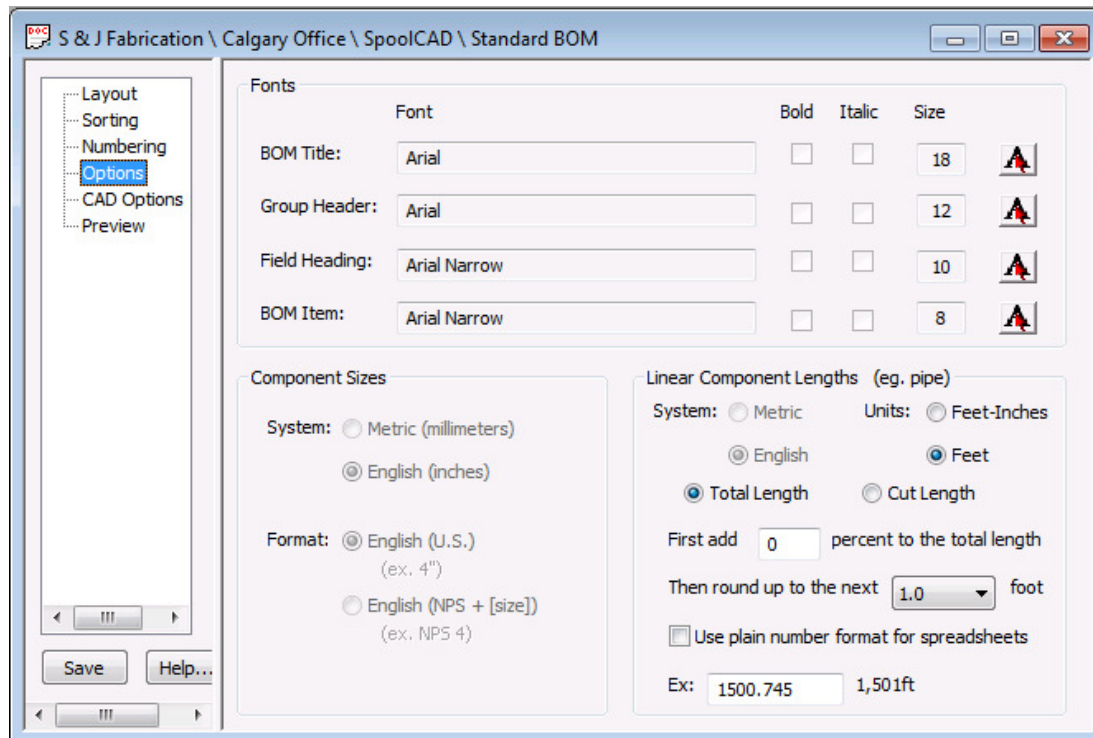
## Options Dialog

Uses this dialog to change the font, type size, and style for all the elements in the BOM including:


- BOM title (the main title)
- Group Header (title for tables in the BOM)
- Field Heading (table headings)
- BOM Item (all list items)

*To access this dialog...*

Click the *Options* dialog in the *BOM Setting Manager* dialog box.



In this field	Enter/do this...
BOM Title	These description fields ( <b>Font</b> field, <b>Bold</b> and <b>Italic</b> check boxes, and <b>Size</b> field) display the current font setting for the BOM title.
Group Header	These description fields ( <b>Font</b> field, <b>Bold</b> and <b>Italic</b> check boxes, and <b>Size</b> field) display the current font setting for the Group Header (table heading).
Field Heading	These description fields ( <b>Font</b> field, <b>Bold</b> and <b>Italic</b> check boxes, and <b>Size</b> field) display the current font setting for the Field Heading (column heading).
BOM Item	These description fields ( <b>Font</b> field, <b>Bold</b> and <b>Italic</b> check boxes, and <b>Size</b> field) display the current font setting for the BOM items (table contents).

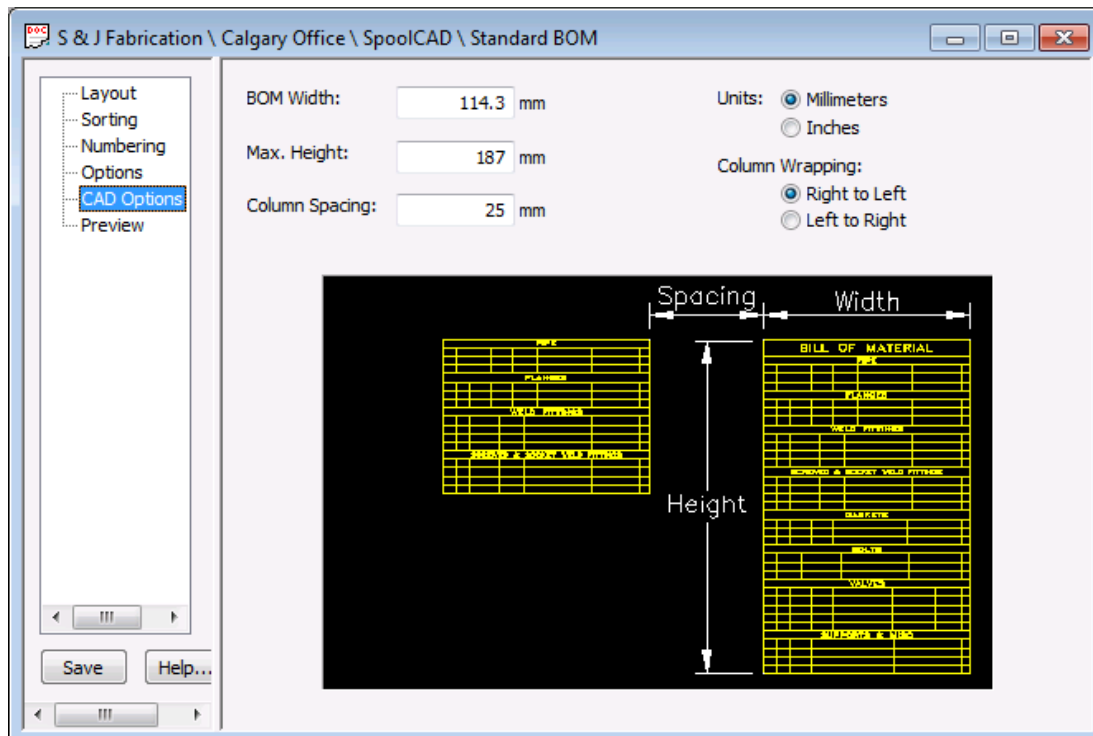
	<p>Each BOM entity has a <b>Select Font</b> button.</p> <p><b>To change font options for any entity...</b></p> <ol style="list-style-type: none"> <li>1. Click the associated <b>Select Font</b> button. The <b>Font</b> dialog box appears.</li> <li>2. Using the list boxes, select the font, style, and size for the BOM item.</li> <li>3. Click <b>OK</b> to close the <b>Font</b> dialog box. The new selections appear in the <b>Fonts</b> tab of the <b>BOM Settings Manager</b>.</li> </ol> <p><b>Note:</b> The <b>Font</b> dialog box displays a list of all fonts, styles, and sizes available on your system. Not all are compatible with AutoCAD. For best results, select standard fonts (Arial, and Times Roman for example).</p>
<p>Component Sizes</p>	<p>These description fields (System option buttons, and Format option buttons) display the current settings for the BOM items</p>
<p>Pipe Length option</p>	<p>When the Total Length radio button is selected, the BOM will display an overall length of each specific size and weight of pipe. When the Cut Length radio button is selected, each individual piece of pipe will be assigned a BOM number, and will be displayed separately on the BOM.</p>
<p>Linear Component Lengths</p>	<p>These description fields (<b>System</b> option buttons, <b>Units</b> option buttons, <b>Percentage</b> field, <b>Meter</b> drop down list and <b>Number Format</b> checklist) display the current settings for the BOM items.</p>

## CAD Options Dialog

Use this dialog to define the size of the BOM placed in AutoCAD including width, height and spacing.

*To access this dialog...*

Click the **CAD Options** dialog in the **BOM Setting Manager** dialog box.



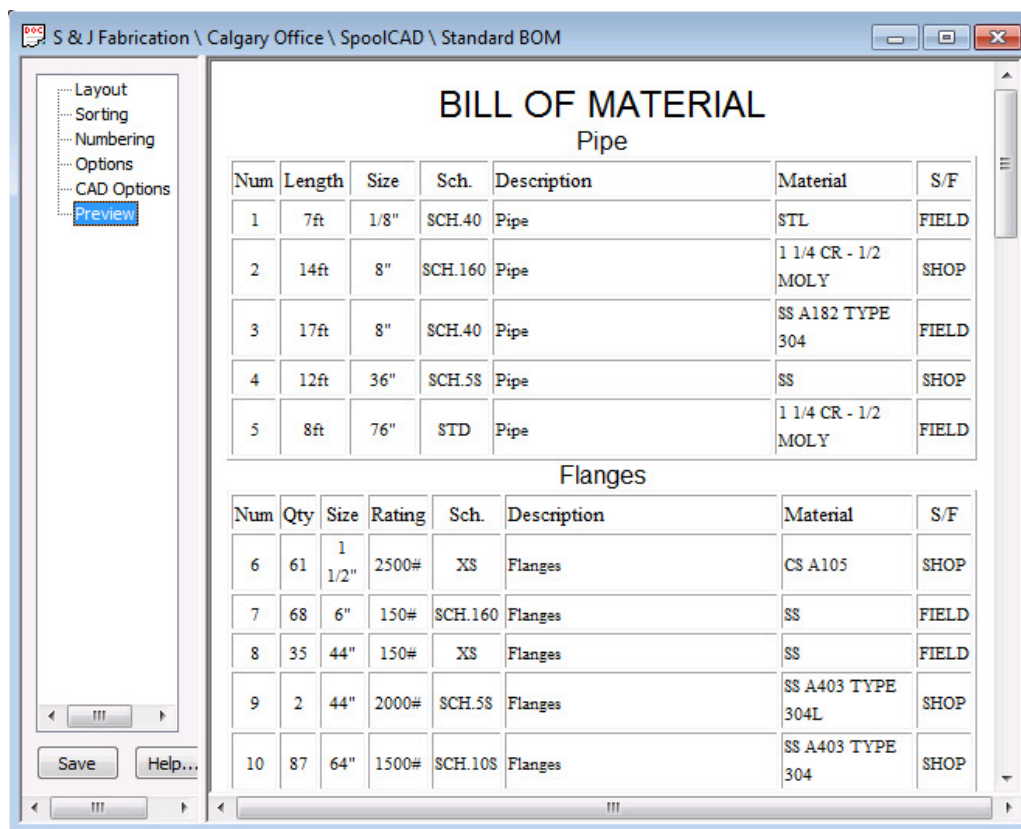
In this field	Enter/do this...
Units	<p>Working units refers to the length and coordinates information used to place components.</p> <p>If you select <b>Metric</b>, lengths and measurements in the BOM will be listed in Metric units. If you select <b>English</b>, lengths and measurements in the BOM will be listed in English units (inches in fractions).</p> <p><b>Note:</b> The BOM width, height, and spacing units are changed using the Units setting.</p>
BOM Width	<p>Enter a value to define the BOM width.</p> <p><b>Note:</b> The minimum allowable value is 0.001. There is no maximum value.</p>
Max Height	<p>Enter a value to define the BOM height.</p> <p><b>Note:</b> The minimum allowable value is 0.001. There is no maximum value.</p>

Column Spacing	Enter a value to define the space between BOM columns. The minimum allowable value is 0.001. There is no maximum value.
Sample BOM	This is a static graphic. It does not update to reflect changes to BOM size or units.

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## Preview Dialog

Use this dialog to view a sample of the appearance of a BOM based on the current template settings.



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