

PL18417

## What Gets Measured Gets Managed—Reporting with Fusion Lifecycle

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Autodesk

### Learning Objectives

- Learn the power of reporting in Fusion Lifecycle
- Learn best practices and strategy for reporting
- Learn how to build basic and advanced reports
- Learn how to create compelling reports for stakeholders and leadership

### Description

Your company uses Fusion Lifecycle software to collect and manage data. But capitalizing on your data to make informed decisions quickly is vital for business success. Learn best practices for using reports to make better decisions. This session will help you to build reports using Fusion Lifecycle software's built-in report functionality, and you'll learn to extract data for real-time decision making on both workstations and your mobile devices. We will cover out-of-the-box reporting, custom functionality, and best practices for creating the best experience for your stakeholders across your company. This session features PLM 360 (now Fusion Lifecycle) and Fusion Lifecycle.

### About the Speaker

I am Tyler Beck, Technical Marketing Manager for Fusion Lifecycle, IoT& CPQ. Based in San Francisco, I live there with my wife and three young children. I worked in the SolidWorks channel for 8 years then in industry as CAD administrator and engineer for another four years working on PDM & PLM implantations. My primary focus is on creating technical and educational content to help customers expand their use of Autodesk solutions. He enjoys sharing product knowledge and expertise with the community via Twitter (@mrtylerbeck) and blogging on [Linkedin](#).



## Creating Reports



Learn how to manage your dashboard of reports and to create a new report.

Watch the Video - <http://autode.sk/2foMbZ5>

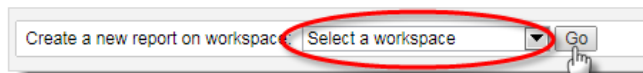


Or, read the help. Link

Create reports and charts to track and manage data on your Fusion Lifecycle site

- From the navigation menu, select **Advanced Tools** > **Reports**.
- **Classic users:** on the menu bar, click **Reports**

1. From the drop-down list, select the workspace to use for the report. This is the data source for the report.



### Three Types of Reports



Using HTML, Excel and graphical reporting.



## REPORTING WEBINAR

Also, check out the webinar from 2014. Although, several years old, it is still relevant and helpful.

<https://attendee.gotowebinar.com/register/108852132>



### PLM 360 PLM Talk Reporting

Join us for a 28 minute look into how reporting works in PLM 360. This is a re-delivery of the webinar from October 2012.

\*Required field

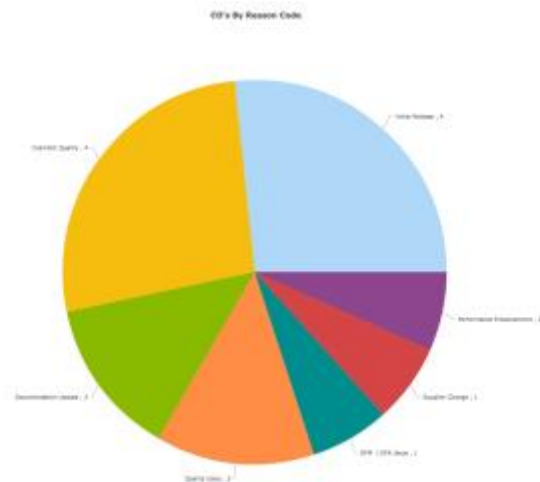
First Name*	Last Name*
<input type="text" value="Tyler"/>	<input type="text" value="BECK"/>
Email Address*	Job Title
<input type="text" value="tyler.beck@autodesk.com"/>	<input type="text"/>
Organization*	Industry
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By clicking this button, you submit your information to the webinar organizer, who will use it to communicate with you regarding this event and their other services.

Register

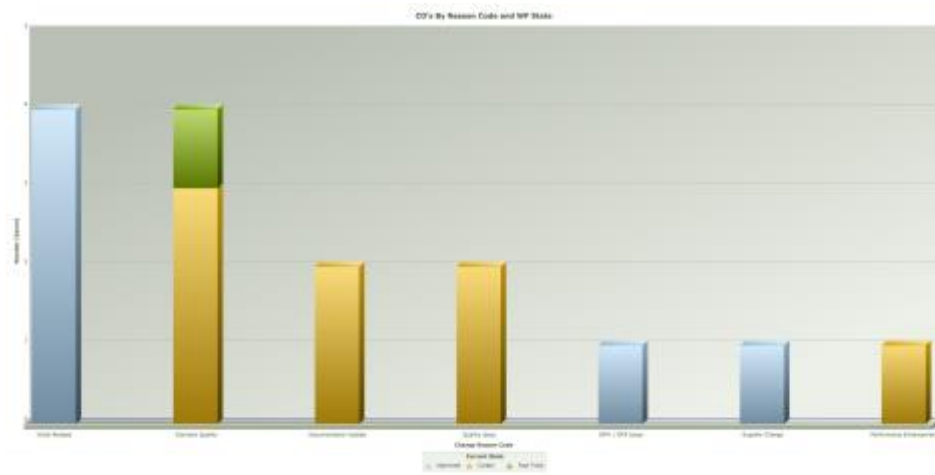


## Change Order By Reason





## Change Order By Reason Code & Workflow





# Quick Wins

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- **Build with Report In Mind**
- **Create Reports Immediately After**
- **Ensure KPI is On Report**
- **Delivering KPI's early retains stakeholder interest**

## FREE TOOLS | REPORTING



**DATAWRAPPER**



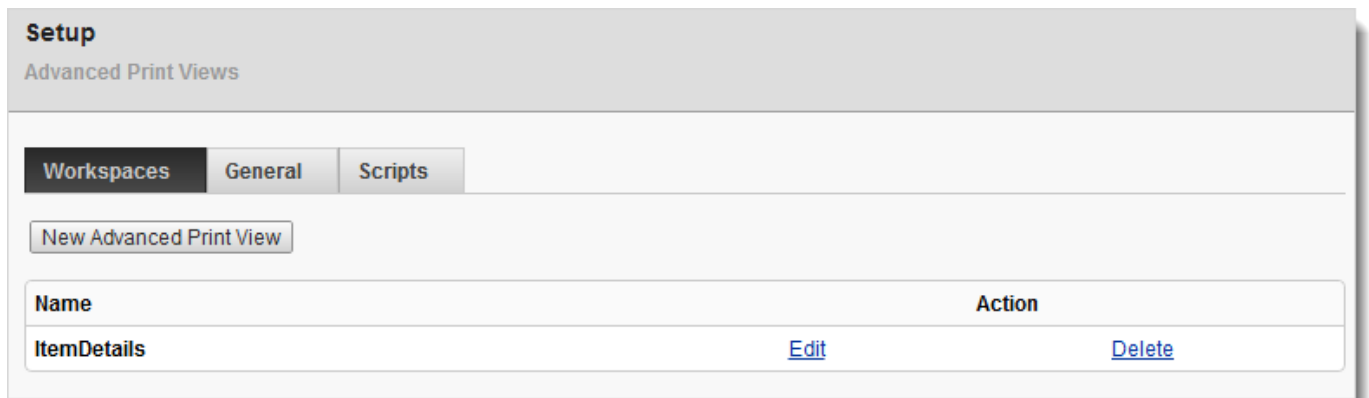
**TABLEAU PUBLIC**

### Set Up an Advanced Print View

Set up advanced print views for a workspace through the Advanced Print Views page.

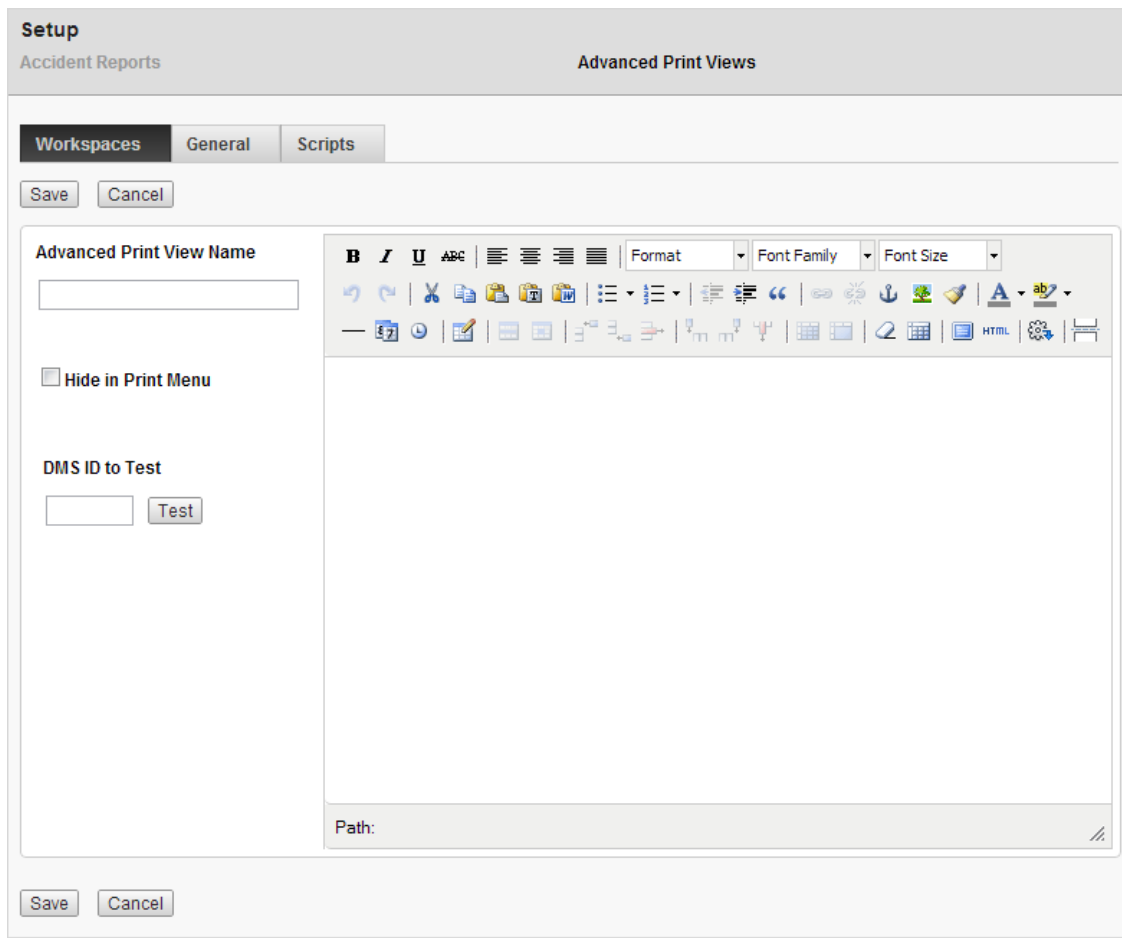
To access the Advanced Print Views page:

1. On the Administrator menu, click Workspace Manager.
2. In the Workspace Manager, expand the workspace's panel.
3. Click Advanced Print Views.



To create the view:

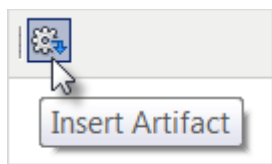
1. On the Advanced Print Views page, click New Advanced Print View.



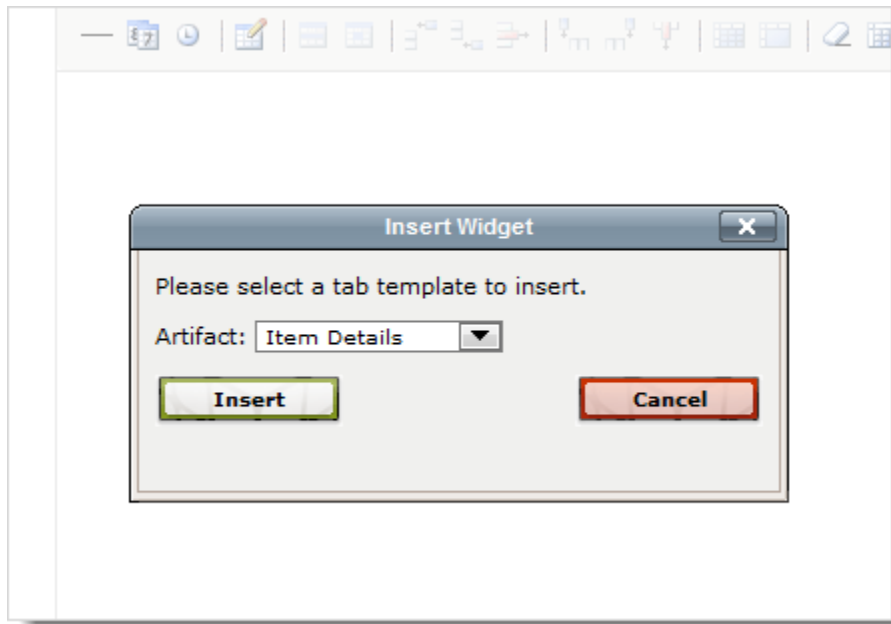
2. Enter a name for the view.
3. To hide the view in the Print task icon drop-down menu on the Workspace Page, select Hide in Print Menu.

To insert workspace artifacts (tabs):

1. In the editor display, click where you want to insert the artifact.
2. On the editor tool bar, click the Insert Artifact icon.







3. In the Artifact drop-down list in the Insert Widget dialog, select the tab with the data you want to appear in the print view.

**Tip:** If you select the Item Details tab, you can insert individual tab sections.

4. Click Insert.
5. Insert other artifacts as needed, repeating steps 1-4.

To add content and apply formatting:

1. In the editor display, enter additional text you want to appear in the view.
2. To apply formatting to an element, select the element and use the appropriate editor tools.

To save the print view:

- Click the Save button.

**Tip:** To preview the print view before saving, enter a workspace item ID in the editor's DMS ID to Test text box and click the Test button.

To save the print view and close the page:

- Click Save and Close.

Data Visualization Tips



<https://www.idrc.ca/sites/default/files/sp/Documents%20EN/Quick-tips-English-22-May-2012.pdf>

## 10 Data Visualization Tips

Data visualizations are an effective tool to communicate research. But to realize their potential, designers should follow these tips to help readers decode their visualizations.

### 1. Keep it simple!

This is the golden rule. Always choose the simplest way to convey your information.

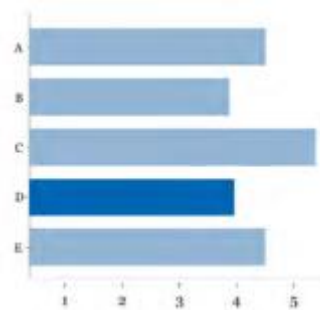
### 2. Have a specific message you want to communicate

Identify the relationships and patterns of your data and focus on what you want to show.

### 3. Select the right chart form

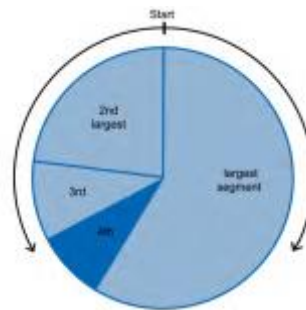
...and know its strengths and limits. Here are some common chart forms:

#### Bar charts



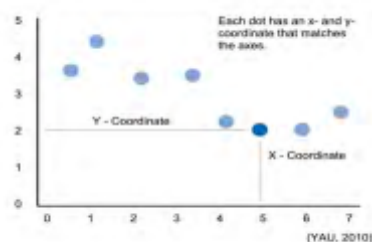
Depict nominal data. They are often used to illustrate comparisons. The value axis should always start at zero and use a consistent scale.

#### Pie Charts



Depict slices of a whole. There should not be more than five slices, and their total value should equal 100%. The largest slice should start at the top and fall to the right.

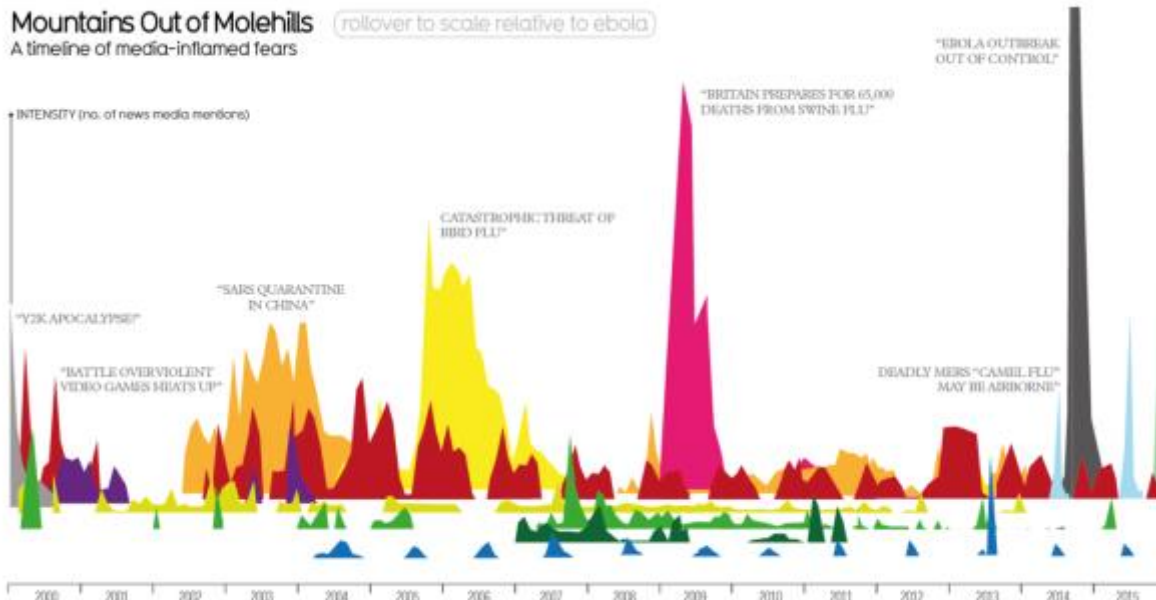
#### Scatter Plots



Depict relationships between two variables. They are effective with large datasets and to highlight patterns or correlations. Danger: the reader may assume a cause-and-effect relationship between the X and Y axes even when there isn't one.

Cool Ted Talk on Data Visualization

<https://www.youtube.com/watch?v=5Zg-C8AAIGg>



<http://www.informationisbeautiful.net/visualizations/mountains-out-of-molehills/>

## General Reporting Tips

\*Every Workspace should have an export and/or report. There should be a left panel search that mirrors your reports.

\*Reports are Terrific export & import tools.

\*Create left panel search & HTML report first.

\*HTML reports with out a chart offer a shortcut directly into records pulled by the report.

\*Bookmark your favorite reports & supersize it with a URL.

\*Bookmark workspaces and open them all it once.

New September 2016. Improved Report Management

Administrators can transfer the ownership of a report to another user. Did someone create a report and then leave the company? No problem. Transfer the report to another user.