

Step by step

How to create a Status Report

Step 1

The screenshot shows a 'Workstation settings' dialog box with a tree view on the left and a configuration area on the right. The tree view includes 'Workstation settings', 'General', 'Personal Desktop', 'Table editors', 'Copy', 'System optimization', 'HTML/XML export', 'E-mail', 'LDAP', 'CARM Server', and 'Networksettings'. The 'CARM Server' option is selected and highlighted in blue. The configuration area contains the following sections:

- You can specify settings for a connection to the CARM server or the CARM NG server.**
 - CARM Server
 - Server IP address: [Empty text box]
 - CARM NG Server
 - Server IP address: [191.141.1.119]
 - Port: [2020]
- CSS module**
 - Copy specific deadlines for modules
 - Copy specific responsibility for modules
 - Show modules beginning with the first approved module
 - Use the name of the structure/variant as default for the module name
 - Inherit severity maximum for the effect fringe of the module
- CSS catalogs**
 - Use CARM NG Server
- CARM Server Administration
- CARM NG Server**
 - when uploading actions use only values from the master structure
 - Use the extended notification service when using the action tracking service of the CARM NG Server

At the top of the dialog, there is a search bar with the placeholder text 'Enter text to find', and 'OK' and 'Apply' buttons.

Firstly, you will need to check if the CARM NG settings are correct. For this go to “Tools | Workstation settings | Settings | CARM Server”. The IP address and port must be valid to be able to connect.

Step 2

The screenshot shows the IQ-RM PRO software interface. The main window is titled "IQ Explorer: C:\Users\Daniel\Desktop\EXAMPLE.fme". The search configuration is as follows:

- Search in document in C:\Users\Daniel\Desktop\EXAMPLE.fme.
- Search patterns (separate alternatives with |): All
- Language: English
- Search scope: Search in current IQ document (C:\...Desktop\EXAMPLE.fme) and Search in the result list
- File search (C:\):

Buttons for "Find", "Find next", and "Define search filters" are visible. Below the search configuration is a table with the following columns:

| Result | File name | Structure/variant | System element | Function/Chara... | Failure | Actions | Number | Owner |
|--------|-----------|-------------------|----------------|-------------------|---------|---------|--------|-------|
| | | | | | | | | |

In IQ Explorer, make sure to select "Search in current IQ document"

Step 3

The screenshot shows the 'CARM Server' menu in the IQ-RM PRO application. The menu items are:

- Administration
- Remote configuration
- CSS module
- CSS Action Tracking NG
- Disconnect from CARM server
- About...

The 'CSS Action Tracking NG' sub-menu is open, showing the following options:

- Upload selected deadlines to CARM NG server
- Download and update deadlines of the current fme from CARM NG Server...
- Download all deadlines for the current filter from CARM NG Server...
- Update all selected actions in the IQ document
- Update all actions in the result list in the IQ document
- More commands...

The 'More commands...' option is highlighted in blue. Below the menu, a search interface is visible with options for 'Search in current IQ document' and 'File search'. At the bottom, a table header is partially visible:

| Result | File name | Structure/variant | System element | Function/Chara... | Failure | Actions | Number | Own... |
|--------|-----------|-------------------|----------------|-------------------|---------|---------|--------|--------|
|--------|-----------|-------------------|----------------|-------------------|---------|---------|--------|--------|

As in the screenshot, select “More commands...” from the menu.

Step 4

CARM NG Server

Available commands: EXAMPLE.fme

- Load all actions for the current fme from the CARM NG Server
- Load modified actions of current fme from the CARM NG Server
- Load all unavailable actions of current fme from the CARM-NG-Server
- Find all actions of current fme which are unavailable on the CARM NG Server
- CARM-NG - Action Tracking - Status Report**
- CARM-NG - Action Tracking - Adaption

This command generates a textual summary of actions "to be done". A PIM-Entry will be created to see the summary.

OK

Cancel

Select "Status Report" from the list. A description of what the function does will appear below.



Step 5

CARM NG Server login - http://191.141.1.119:2020

User: example

Please enter password: [masked]

OK

Cancel

To obtain a connection to the CARM NG Server, a valid username and password is required.

Step 6

IQ-RM PRO

Personal Information Manager: CARM-NG - Action Tracking - Status Report 06/06/2016 14:47:42 was created! Open in/synchronize with Personal Information Manager?

Yes

No

This dialog will appear if the correct username and password are entered. Click “Yes”.

Step 7

The screenshot shows the IQ-RM PRO software interface. The main window is titled "IQ-RM PRO - APIS Informationstechnologien GmbH [10000-50] - Personal Desktop". The menu bar includes File, Edit, View, Format, Administration, Editors, CARM Server, Consolidation, Tools, Window, and Help. The toolbar contains various icons for file operations and editing. The status bar at the bottom shows the current file path, user, permissions, and language.

The "Search" window is open, showing search options for the document "EXAMPLE.fme". The search patterns are set to "All" and the language is "English". The search scope is set to "Search in current IQ document (C:\...\Desktop\EXAMPLE.fme)".

The "Personal Information Manager (PIM)" window is open, displaying a "CARM-NG - Action Tracking - Status Report" for the file "EXAMPLE.fme". The report includes the following information:

- File: EXAMPLE.fme
- Date: 06/06/2016 14:49:22
- Number of actions (open and with responsible) in the fme: 80.
- Number of actions on the CARM-NG-Server (concerning the current fme): 0.
- Actions (open and with responsible) in the fme-file not available on the CARM-NG-Server: 80
- There are more than 50 missing actions available. The missing actions can be uploaded to the CARM-NG-Server using the IQ-Explorer.
- Actions with different attributes (fme != CARM-NG): 0
- Actions on the CARM-NG-Server not available in the fme (obsolete): 0

The PIM window also shows a tree view of the document structure, including "System elements", "DRBFM II", "Conversion messages", and "Changes made by CARM NG". The "Changes made by CARM NG" section is expanded, showing a "CARM-NG - Action Tracking - Status Report 06/06/2016 14:49:22".

You will automatically be directed to the PIM Manager, where you can see the generated Status Report.

Step 8

The screenshot shows the IQ-RM PRO software interface. The main window displays a file explorer on the left with a tree view of system elements. The right pane shows a report titled 'CARM-NG-Server: 80'. A context menu is open over the report, with 'Send as e-mail...' highlighted. The menu options include Copy, Cut, Paste, Paste special, Templates, Find..., Insert/edit graphic..., Insert line, Save as..., Save image as..., Embed referenced documents/graphics, Extract referenced documents/graphics, Update embedded documents/graphic, Print..., Send as e-mail..., Text properties..., Paragraph properties..., Back color..., Link, Fields, and Redraw. The status bar at the bottom shows 'Supervisor', '\$\$: Read/write', '1/16', and '>English'.

There it is! If you want, you can send this report in an email to your friends, family & colleagues, for hours of reading pleasure.