


## Technique for customising Report Balloon Symbols

In some cases when BOM balloons are displayed for a repeat region, it is desirable to have the balloons appear as a symbol other than the default symbol, a circle. The procedure below demonstrates how to create and use custom BOM symbols.

### Procedure

Create a drawing of an assembly and create a BOM for that assembly. In this example, the custom BOM balloons will be displaying the index of the components, so **rpt.index** must be a symbol in the repeat region. See Figure 1.

INDEX #	PART_NAME	QUANTITY
1	CASTER	1
2	CONNECTOR	1
3	PIN	1
4	WHEEL	1

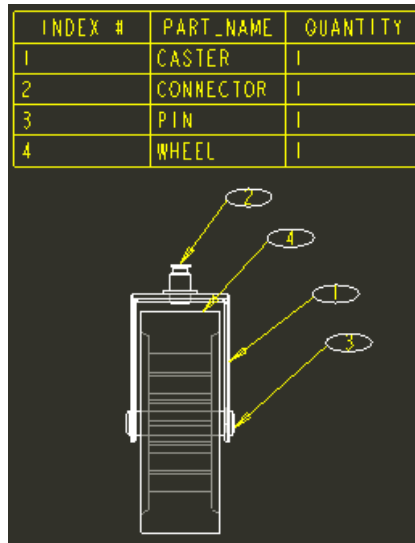


Before a custom BOM balloon can be used, a symbol must be created to represent the BOM balloon. To do this, select **Format > Symbol Gallery > Define** > type the name of the symbol. Sketch in the desired symbol geometry. To be able to reference information from a repeat region in a BOM symbol, variable text notes must be created in the symbol. A variable text note must start and end with a "\". The text of the note can be any string, but the default value of the note must be equal to the parameter used in the repeat region.

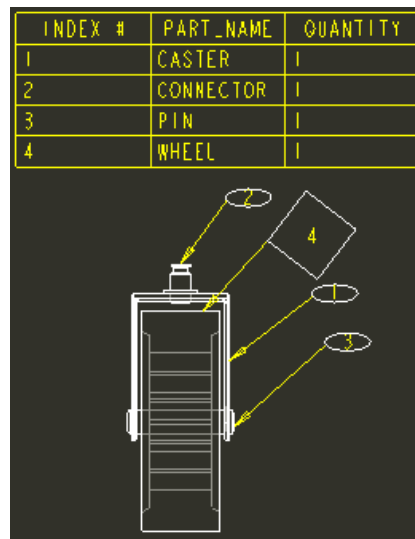
For example, if a note in a symbol is to reference **asm.mbr.name** from the repeat region, the text of the note can be "\name\", but the default value for the variable text must be "asm.mbr.name". There are two exceptions to this. To reference the information generated by **rpt.index** or **rpt.qty**, the default values of the notes can be "index" and "qty", or "rpt.index" and "rpt.qty", respectively.

To use custom balloons for this BOM, click **Table > BOM Balloons > Set Region > Custom** > click in the repeat region that is to have BOM balloons set. Click **Retrieve** to retrieve a symbol stored to disk or **Name** to retrieve a symbol stored in the current drawing. This will set the repeat region with the desired balloon.

To show the balloon in the drawing click **Create Balloon** > click the method to show the balloons (**Show All, By View, By Comp or Comp & View** ). See Figure 2.



Suppose that there is a company standard that all hardware parts be shown with a different BOM balloon than manufactured parts. To do this, click **Table > BOM Balloons > Alt Symbol** > click on the balloon or balloons whose symbol is to be replaced > **Ok** > **Name** or **Retrieve** and click the name of the symbol to use or **Pick Inst** and click on an symbol in the drawing. See Figure 3.



In order to be able to replace a BOM balloon with a different symbol, the repeat region parameters displayed by the new symbol must match the old symbol. That is, if the original symbol only displayed the index in the balloon, the new symbol can not display the index and the quantity, only the index.

If a symbol is mistakenly changed, or all the replaced symbols are to be changed back to the default symbol, click **Table > BOM Balloons > Alt Symbol** > click on the balloon or balloons whose symbol is to be changed to the default setting > **Ok > Reg Default**.

If a symbol with instances is used as the custom BOM symbol, Pro/ENGINEER will prompt for the instance to be used for each BOM balloon that is shown.

Unlike the default BOM balloon provided by Pro/ENGINEER, custom BOM balloons do not need to be displaying the quantity of a component in order to be merged or split.