Operation PRO.FILE advanced

PRO.FILE Release 8.7
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PROCAD

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About this manual

This PRO.FILE manual uses various signs and icons in order to guarantee a good readability and comfortable handling.

For quicker finding within the manual, step-by-step instructions are marked with a margin heading.

Menu sequences and function calls
Menu sequences and function calls explained in this manual are marked in bold and in quotation marks.

Example:
"**File**" => "**New**" => "**Document description**"

Buttons and keys
Keys and buttons are highlighted by angle brackets.

Example:
"Confirm with <**OK**>."

Notes and warnings
To highlight special information the following icons are used:

	Function call:
	"PRO.FILE" => "Extras" => "Options" => "Performance"

	Example:
	Boxes marked with this icon give subject-relevant examples for the usage of command lines, configuration strings and other software-relevant entries.

	Note:
	Boxes marked with this icon contain useful hints on the operation, configuration or installation of the PRO.FILE software.

	Attention:
	All information given in these boxes is very important and should be read carefully! Non-observance of these hints may lead to wrong functioning, display problems or other negative consequences.

	Important notes:
	The "stop sign" warns you of possible entry or operation errors, which may lead to loss of data!

	Attention – Undo not possible:
	All entries and configurations described in these boxes have to be made carefully, because they cannot be undone!

1   PRO.FILE Advanced – Creating, Managing and Changing

This manual builds upon the manual "PRO.FILE for Beginners – Search, find, open" and contains extended information in the following chapters:

- The PRO.FILE GUI
- The PRO.FILE register tabs
- Searching and finding: selecting data records
- Functions of the favorites bar
- Working with documents in PRO.FILE
- Working with parts in PRO.FILE
- PRO.FILE status management: Support and Control your Workflow
- Via transmittal: Data exchange from PRO.FILE to PROOM
- Optional: The PROOM Integration in PRO.FILE
- **Fehler! Verweisquelle konnte nicht gefunden werden.**

> **Note: Working with PRO.CEED projects, processes and tasks**
>
> The functions for PRO.CEED processes, projects and tasks described in the context of PRO.FILE require a separate PRO.CEED license.

2   The PRO.FILE objects: An overview

For the classification of data, PRO.FILE works with different object types:

Documents: All files saved in PRO.FILE are saved under the object type "Document". For this purpose, a document description is created, containing classification information of the data. See the following chapter "Working with documents in PRO.FILE".

Parts: Parts only consist of a "part description" in PRO.FILE. Part descriptions classify a design part or element. By the connection and structuring of parts, the bill of materials of an assembly is composed. The object "part" in PRO.FILE corresponds to an "article", "article master" or "material master" as often referred to in other systems.
See "Working with parts in PRO.FILE".

Projects: Projects are "case binders". Within a project you can collect documents, parts, tasks and sub-projects according to your requirements, structures, orders or product groups.
In the second step, special permissions can be assigned to projects. This is done via the role concepts of PRO.FILE.
For further information, please see the manual "Operation PRO.CEED Base".

Folders: Folders are objects that can be used as structure objects in the context of projects or standalone and that can be linked to create larger structures of documents, parts, tasks, etc.

    Folders can also be used for the quick saving of files in PRO.FILE with automated classification of the document description.

Transmittals: Transmittals are digital dispatch lists. See "Transmittal: digital dispatch list with PRO.FILE".

Tasks: Tasks describe a specific activity or work assignment with a clearly defined date, duration and work information to be assigned to a user. It is possible to link documents and parts from PRO.FILE to a task. Tasks can be created separately or within the larger context of a process or a project. If a task is created within a project, the time components of the task are reflected in the Gantt chart of the project.

Processes: Processes describe order of tasks for the definition of a specific business process, including the time components of the tasks. An example would be a "service request" which includes different steps for processing. It is possible to define sub-processes, which can be run in parallel. A pre-defined process is started in separate process instances. For more information, see the manual "Operation PRO.CEED Base".

2.1   For explanation: Documents and document types

Various document types such as drawings, test reports, invoices, images, bids, documentation, faxes received etc. require specific fields for receiving information relevant to them. Thus the field "Invoice receipt" will be relevant to an invoice, but less likely so to a CAD drawing.

The varied information requests can be classified, sorted and managed via special document types so that not all masks need contain all fields. For example invoices could containonly data relevant to invoices and "drawings" only data relevant to drawings.

To this end individual document types are provided for various types of documents in PRO.FILE. Classification of documents is then effected via these document types. Likewise, a document type controls the "handling" of the associated document description in PRO.FILE

In the process, document characteristics can be assigned to each and every one of these "document types". The fields of the assigned document characteristic are available via the selection of a document type, in addition to the fixed document description's fields (which are identical for all documents).

The following figure illustrates this. You can access the associated document characteristics by selecting the document type "CAD document" in the fixed document description:

3   The PRO.FILE GUI

After logging in to PRO.FILE, the Cockpit appears, which gives you faster and easier access to stored data. See chapter:

- [The PRO.FILE Cockpit](#)

Once you have accessed and selected parts or documents the PRO.FILE user interface will appear. This interface, which is shown below, is divided into different areas:
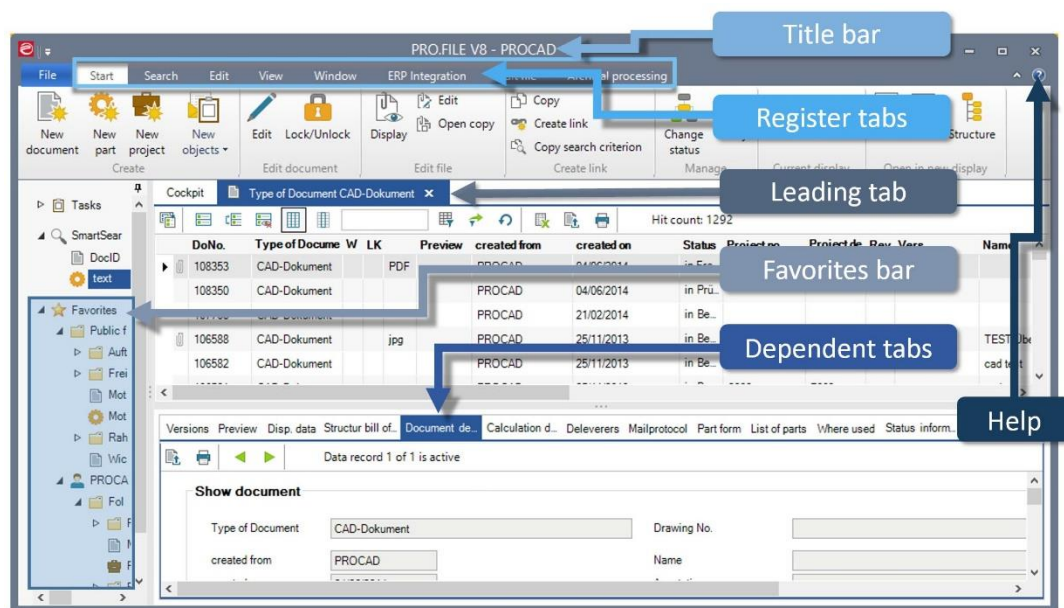
- The title bar shows the name of the logged-in user. When working with projects, it also shows the activated project and the corresponding project role.

- [The PRO.FILE register tabs](#) contain the various commands and functions for the work with PRO.FILE.

- The leading tabs display the result of a search in different display types. Each search opens a new main tab. The name of the tab corresponds to the search criteria.

- [The dependent tabs in PRO.FILE](#) allow the quick access to additional information relating to the PRO.FILE object selected in the main tab.

- [Saved searches and subscriptions](#) – Via the favorites bar in PRO.FILE, documents, parts and projects can be summarized in lists, which can be accessed via favorites for direct access without having to perform a corresponding search manually.

3.1   The PRO.FILE Cockpit

After logging on to PRO.FILE, the Cockpit appears which gives you faster and easier access to stored data.

This Cockpit will remain open after the opening of further lists and form displays. The Cockpit is always available via the main tab "Cockpit".
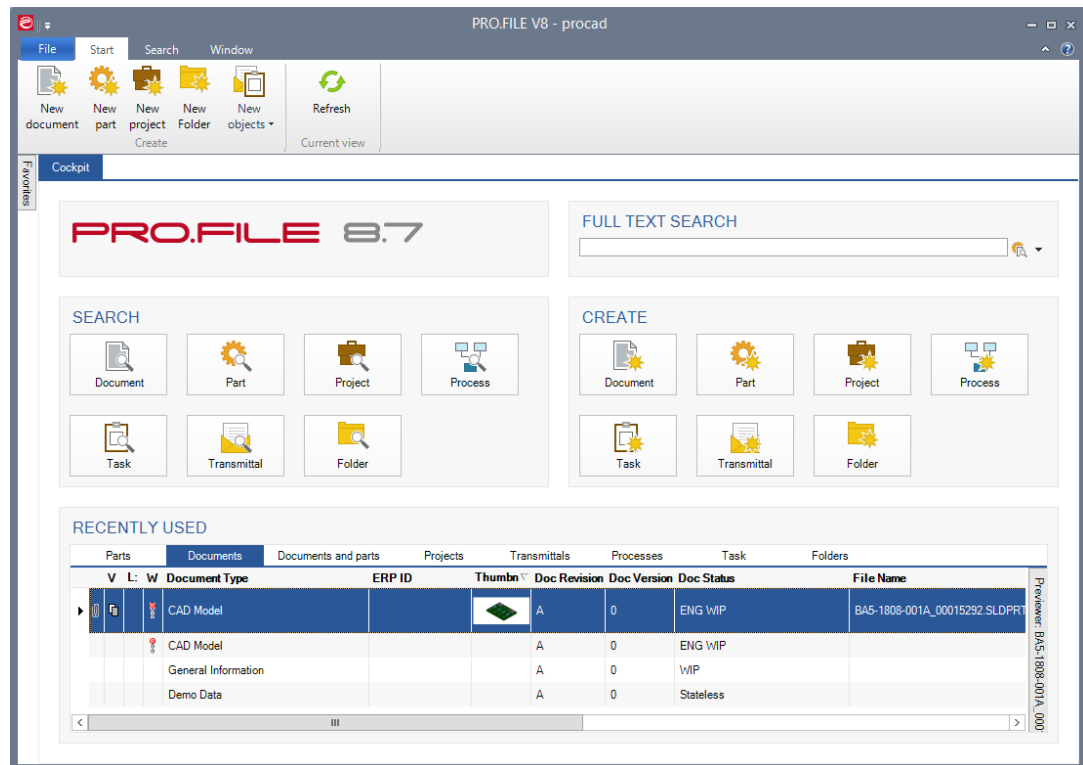
The Cockpit page offers different options for quick access to data:

- **The full-text search:**
  (The system administrator has to activate the full-text search in order for you to be able to use this function!) The input field "Full text search" in the upper corner of the initial screen allows you to search the document descriptions as well as the attached files or part descriptions in PRO.FILE for a certain keyword. Simply enter the word you are searching for into this field and use the drop down menu ▼ to select the desired object type.

- Then, click on the corresponding icon in order to initiate the full-text search. Any document descriptions and attached files or part descriptions that match your query will be displayed in a list of the results.
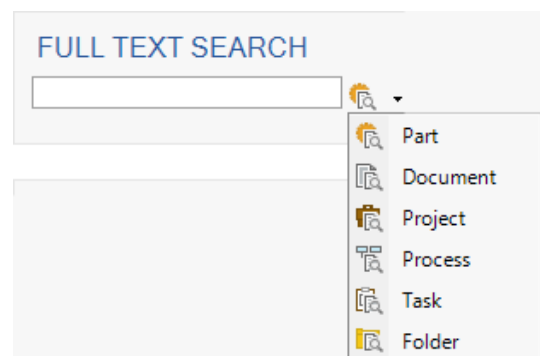
- **Selecting objects:**
  In order to access data records and to display them in PRO.FILE, a selection has to be made. This selection can be made by clicking the corresponding icons on the PRO.FILE initial page. This function can also be found in the "Selection" menu in the PRO.FILE menu bar. If you repeatedly make a certain selection, the favorites will be of great help to you. Please refer to chapter: "Searches using the search form".
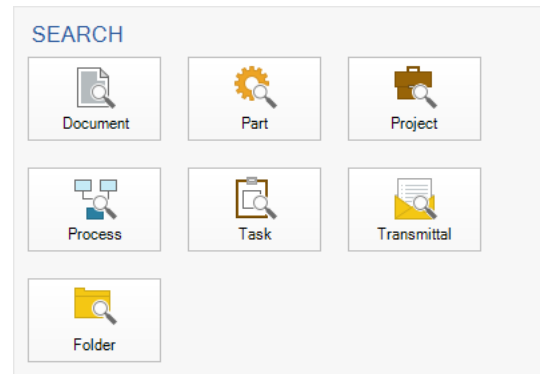
- **Creating documents, parts or projects:** If you wish to create a new document description, parts description or project description after logging on to PRO.FILE, you can do this using the corresponding icons on the initial screen.
  The storage assistant will appear which will help you with the creation of the data record. This function can be found in the tab "Start" located within the PRO.FILE tab bar. Please refer to chapters: "Create new part" and Create new document description" for further information.
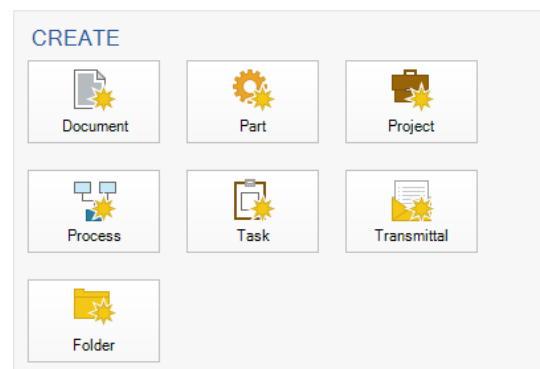
- **Accessing recently used objects**: You can find a list of recently used documents, parts, projects, etc. in the lower area of the Cockpit. You can use the displayed tabs to select the object type that you want listed:

The list will always contain 30 objects that were last used. Double-clicking a list entry allows you to access the data record in a form view. Within the list you can also use the context menu of the right mouse button to open a menu with presentation and editing options.

- The file preview for documents:
  If the list of recently objects is used to display documents, a preview can be displayed for the selected document with a configured viewer.
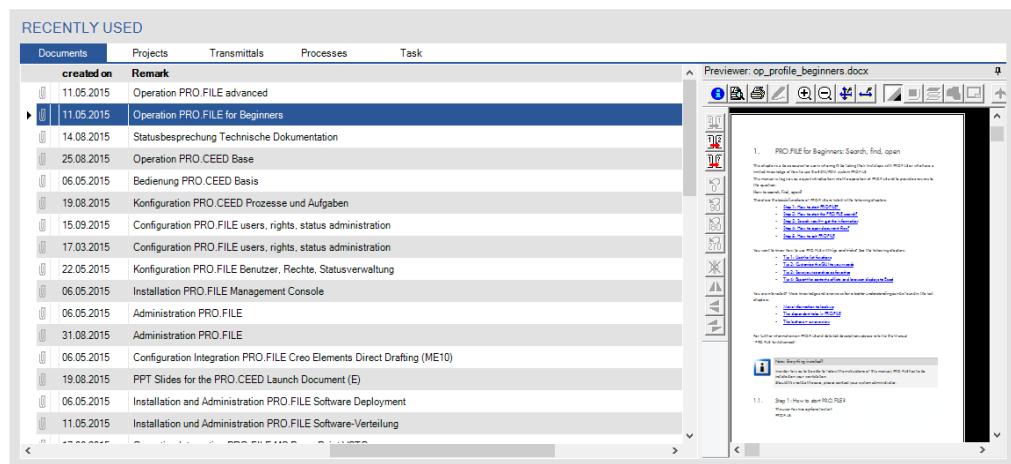
	Note: Access to recently used documents via the PRO.FILE Jumplist

In the Windows taskbar, the list of recently used documents can be accessed via the PRO.FILE program icon.

Click on the PRO.FILE icon with the right mouse button and select the desired document from the list "Recently used".

The selected document record is then displayed in PRO.FILE.
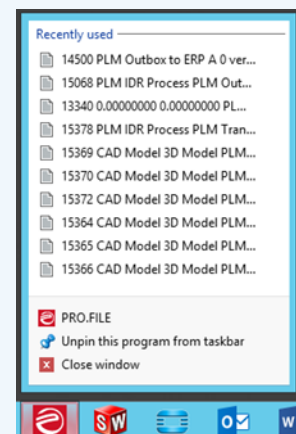
Customize the PRO.FILE Cockpit

The PRO.FILE Cockpit can be customized. There are several widgets, the contents and positions of which can be changed.

The adjustment is made via the function "Customize Cockpit" from the "Window" tab.

	Function call:
	"Window" => Area "**Manage**" => "**Customize Cockpit**"

	Note: A matter of permissions
	The customization of the PRO.FILE Cockpit requires the corresponding function access right. If the function "Customize Cockpit" is not displayed, you do not have this permission.

After clicking on this function button, the left-hand side of PRO.FILE displays the area for customizing the Cockpit. A detailed description can be found in the following chapter: "Tip: Customize the Cockpit".

3.2   Working with forms, lists and browsers

There are different window types for the display of search results in PRO.FILE:

- PRO.FILE form displays: Working with forms
  Display of a single data record in form view, with all available data fields displayed on the form.

- PRO.FILE list displays: Working with lists
  Display of several data records, usually listed by a search criterion.

- PRO.FILE browser displays: Working with Browsers
  The browser displays are usually not used to display single data records but rather their structures and links to other objects.
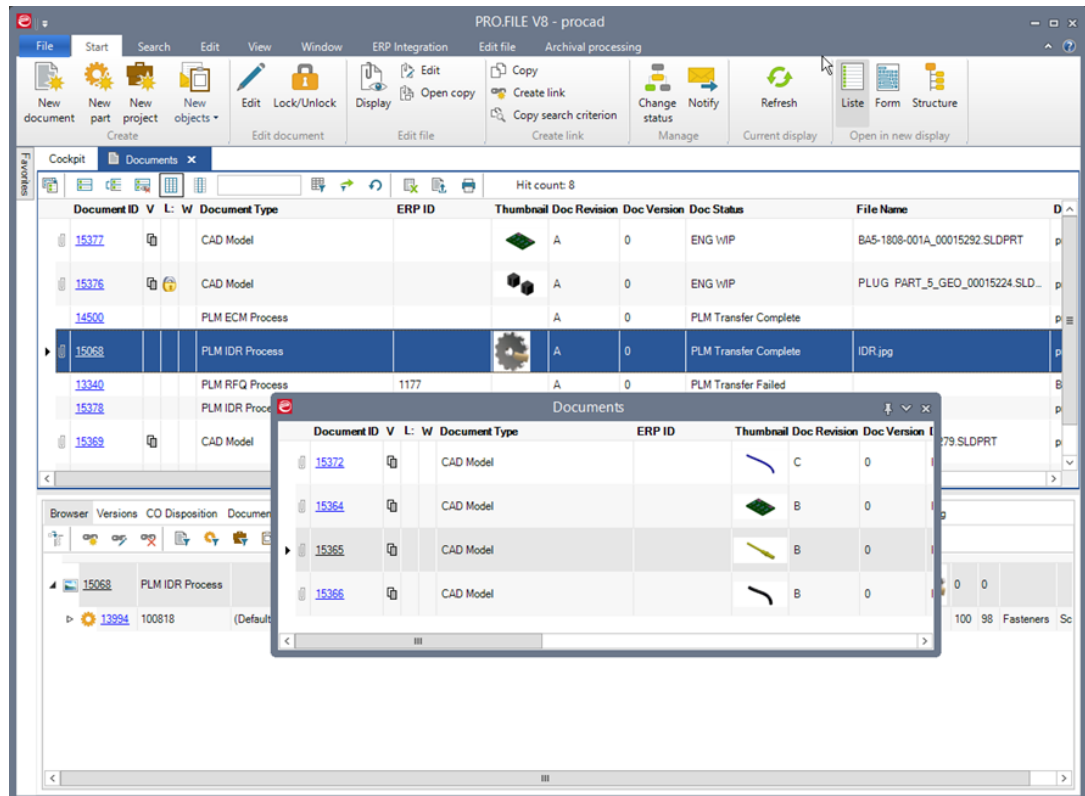
The different views contain different elements and features for the display and modification of data and information.

These views are always displayed in the main tab or the dependent tab. Further information on tab usage can be found in the chapter:

- The dependent tabs in PRO.FILE

Display as a form

Only one record is shown in a form. Using the arrow buttons in the toolbar of PRO.FILE, it is possible to thumb through the forms.
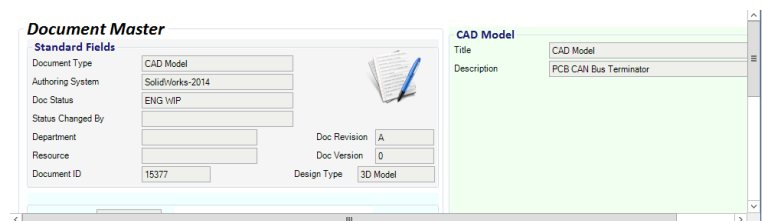
The display of a preview picture occurs in the forms "Display document" and "Check out document". The settings are made for this in the PRO.FILE form designer.

Display as a list

If a file is attached to a document record, it would be shown as a bracket symbol in the first column of the list.

Document ID	V	L:	W	Document Type	Thumbnail	Doc Revision	Doc Version	Doc Status	File Name	Doc Created By	Doc
▶ 15377				CAD Model	◆	A	0	ENG WIP	BA5-1808-001A_00015292.SLDPRT	procad	09/2
15376				CAD Model		A	0	ENG WIP	PLUG_PART_5_GEO_00015224.SLD...	procad	09/2
15375				CAD Model		B	0	ENG WIP	3420302A_00015293.SLDPRT	procad	09/2
15337				CAD Model		A	0	ENG WIP	pin_00015328_00015337.par	procad	09/1
15336				CAD Model		A	0	ENG WIP	cylinder_b_00015327_00015336.par	procad	09/1

If a preview picture, a thumbnail is saved to a document, it will also be displayed in the list. See also the chapter: "[Displaying thumbnails in lists and forms](#)".

Permanent columns in a list that are always displayed and cannot be scrolled can be made to stand out using a different color. (See also the chapter "[Arrange list views and save them](#)").

The lists in PRO.FILE have full mouse wheel support.

The highlighting of list entries is carried out by clicking on the required entry with the mouse button. If several lines are to be highlighted, the left mouse button should be clicked and dragged over the lines to be highlighted.

Further information on working with lists, can be found in the chapter: "[Working with lists](#)".

Display in browser

This display shows the links between the parts, documents and projects, plus it shows the corresponding structure levels:

The browser display shows the structure overview, the usage proof, the part and document usage, as well as various bills of materials.

The administration and the processing of the entries, positions, and links of this browser are carried out using functions available in the context menu, which can be activated using the right mouse button.

While the structure overview shows which objects are attached to the active object, the usage overviews are listed in reverse order, and show in which of the structures the active object is built into.

3.2.1   Sidestep: Input masks and output masks

There are two types of windows for the communication with the PRO.FILE user interface. The first type of window is for you to enter data into PRO.FILE, the other is for PRO.FILE to display data and information for you.

A basic difference is therefore made between "input forms" and "output forms":

- The entry of data and information for the filing and modification of data records and for the running of searches is usually done via input forms.

- The display of data on the other hand is made in output forms via three different window types:

    - In forms

    - In lists

    - In browsers

The difference between these two PRO.FILE basic form types is as follows:

- **Input forms**
  enable you to enter information into PRO.FILE. This is used, for example, to select, create and/or edit an object. Please refer to chapter: "The PRO.FILE fields: How can I enter data?".

- **Output forms**
  show you information that is saved in PRO.FILE, serves the information, and then shows it as a form, a list or a browser.
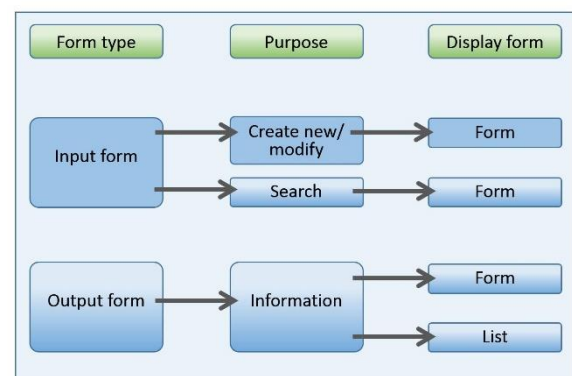
Note:

The structure and appearance of the input and output masks as well as the fields and data displayed therein are set by the system administrator in the form designer of the PRO.FILE Management Console.

3.2.2   Working with forms

One data record is shown on each page of the form display.

The system administrator can determine by configuration, the way it looks, its contents, and the way in which the form is divided.

Depending on the configuration, the fixed as well as the variable object master records will be shown in the form.
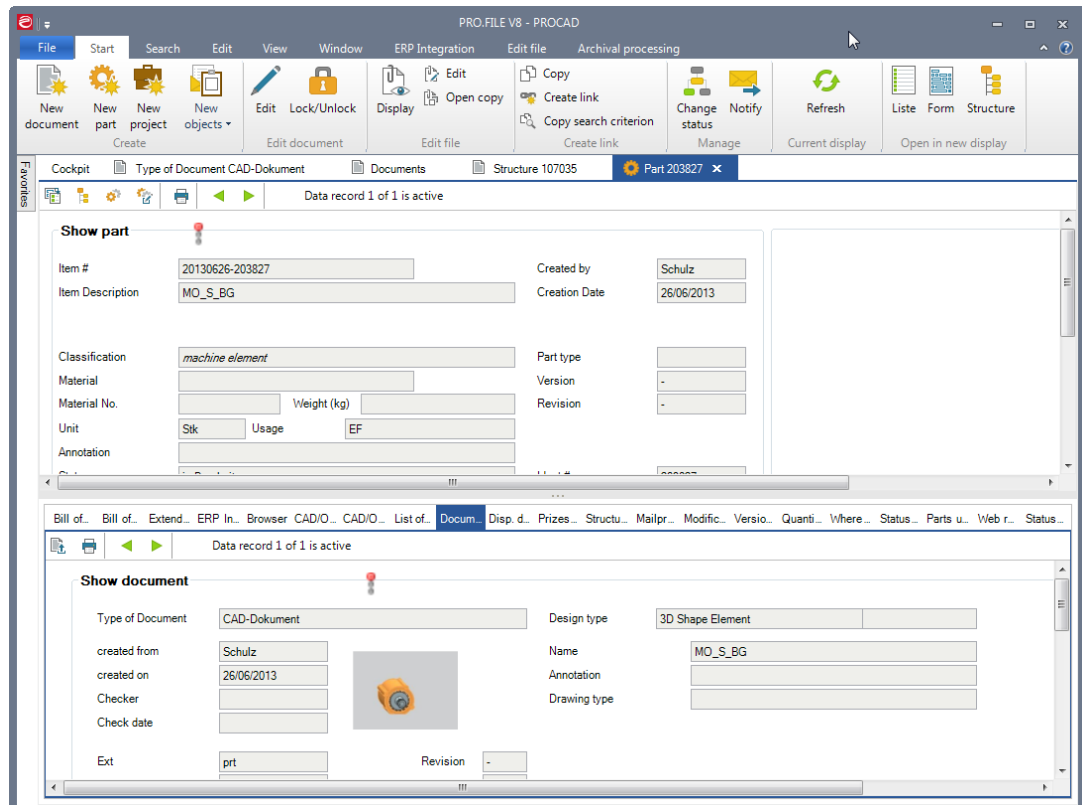
If several master records are found in a search, you can scroll from one to the other using the buttons

- Previous data record

- Next data record.

You can switch between the form and the list view for the current data record by clicking the icon.

Forms are used both as input or output screens.

Also, selection of and search for data records is carried out using forms: "Searches using the search form".

3.2.3   Working with lists

This chapter describes the possibilities that are available when working with lists in PRO.FILE. This includes:

- "List structure" and "Select multiple data records"

- Additional user information: "Symbols within the list"

- Sort a list

- Adjust column order and column width

- Arrange list views and save them

- Available list functions

The information concerning lists, refers to hit-lists, document lists, and part lists, and are described in the following sub-chapters.

List structure

The active row is indicated by colored highlighting.

All commands in list operation refer to the active row. You can change the active row by

- clicking on a different row, or
- switching the active row using the cursor to move up or down.

Select multiple data records

How Select multiple data records do I select multiple data records and which will then be the current data record?

If a data record is displayed as a form, it is automatically selected and with that the current data record.

One data record is always active in a list but several can be selected. This current data record is encircled with a dotted line. All functions which are applicable to the individual data records apply to this line.

A selection (clicking on the item) will also mark the current line. You can then move the selection using the cursor buttons.

Multiple selections

Various functions (so-called group functions such as Delete) can take effect on several data records simultaneously. The multiple selection is used for this.

- If you hold down the SHIFT key while clicking, you can bring about a "from-to" selection (cf. operation of MS Windows).

- If you hold down CTRL while clicking, the multiple selection of non-contiguous individual data records will be achieved. (Cf. operation of MS Windows). A further click removes the marking again. The current data record cannot be deselected. Please note that the selected data record is not necessarily the active data record.

Symbols within the list

What do the symbols within the list signify?

Document ID	V	L:	W	Document Type	Thumbnail	Doc Revision	Doc Version	Doc Status	File Name	Doc Created By	Doc
15377	🗎			CAD Model		A	0	ENG WIP	BA5-1808-001A_00015292.SLDPRT	procad	09/2
15376	🗎	🔒		CAD Model		A	0	ENG WIP	PLUG_PART_5_GEO_00015224.SLD...	procad	09/2
15375	🗎			CAD Model		B	0	ENG WIP	3420302A_00015293.SLDPRT	procad	09/2
15337				CAD Model		A	0	ENG WIP	pin_00015328_00015337.par	procad	09/1
15336				CAD Model		A	0	ENG WIP	cylinder_b_00015327_00015336.par	procad	09/1

The following symbols are used in the PRO.FILE list views to display additional information:

- 📎 The paper clip symbol in the first line of the list indicates that a file is attached to the document description. The documents can be displayed using the structure view or the corresponding tab.

- ☐ No file is attached to the document description if the field in the first column is empty; there is only the metadata of the document description.

- 🗗 This symbol within the document list indicates that older versions of the listed document are available.

- The icons 🗗 / 🗗 show with their darker color shade for the selected document

  - 🗗 that one or more older version(s) exist(s) for the selected document.

  - 🗗 that one or more newer version(s) exist(s) for the selected document.
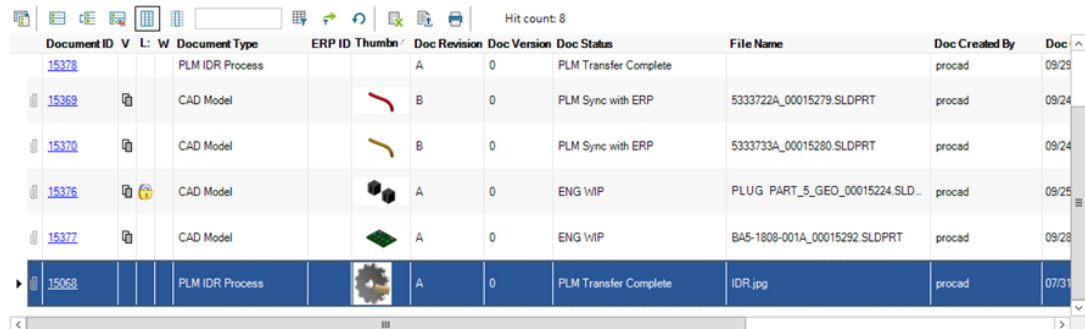
> **Note:**
>
> This symbol is not displayed for the very first document.
> Whether this symbol is displayed or not is set by the system administrator.

- 🔒 A symbol can be displayed to indicate a locked object. By default, this is indicated by a lock symbol. However, the system administrator can change this setting.

- Workflow statuses, as well, can be indicated using symbols. A specific symbol can displayed for each specific status. The symbols used for the different statuses are decided by the system administrator at your company. The traffic light icons are examples for colored symbols indicating different statuses. Red means "In Progress", yellow means "Being reviewed" and green means "Being released".

Available list functions

If a list is displayed in a tab within the PRO.FILE user interface, different list functions are available to you through the icons in the local toolbar. This is true for the leading tabs as well as for the dependent tabs:

The icons available for the list functions are divided into two application areas:

-
  The first four icons offer various possibilities for marking the list entries.

-
  The following icons allow for a targeted search and filtering of data records within the list. The following functionalities are available through these icons:

Selecting

- **Select all lines**: This icon lets you mark and select all lines within a list. Any functions that can be used for multiple data records, e.g. a status change, can now be carried out collectively.

- **Toggle selection**:
  By pressing and holding the <Shift> key it is possible to mark an area of lines. Several different lines are marked by pressing and holding the <Ctrl> key. If you wish to invert your selection, that is to mark everything that had been left unmarked and to unmark anything that had previously been marked, simply use this icon.

- **Hide selected lines**:
  If multiple lines are marked within a list, these can be hidden using this icon. Of course, these marked data records will only be removed from the list and not from the database.

- **Show hidden lines**:
  With this button, rows that have been hidden can be displayed again.

Search

- ⊞ ⊞ **Search in all columns / Search in active columns:**
  In order to be able to perform a targeted search for terms in the list, the user first has to select whether the search is to be carried out across all columns in the list or only for a specific column in the list. This is an either/or setting which means that one of the icons will always be activated. The activation is indicated by a colored framing.

  - ⊞ : The search is performed across all columns in the list.

  - ⊞ The search is performed for the active column only. A column is activated by clicking the respective column header.

- [____] ⊞ **Define Filter pattern** / Filter: A character string can be entered into the entry field located within the icon bar. Here you can use the wildcards/meta characters described in the chapter "<u>Note: Optimize your search by using wildcards</u>".
  The wildcard "*" is not required all other wildcards can be used.

  The search for the entered character string is started using the ⊞ icon.
  If the search pattern is found, the respective data record becomes the active line. If the search string is not found, a message is displayed and you will remain in the active line.

- 🔍 **Next found pattern:** This icon is used to once again compare the entered filter pattern with the columns that are to be searched. The first data record found is then turned into the active line.

  - Hide/show filter ▼ :
    Via this button you can display functions for the advanced filtering of the list (see chapter "<u>How can I filter results in lists?</u>").

Sort a list

How do I sort a list, including multi-level sorting?

Sorting functions enable the user to sort a list, in descending or ascending order, simply by clicking on the column header. The sorting order is indicated by the arrow sign in the column header.

Multi-level sorting

It is also possible just using keyboard and mouse to carry out multistage sorting i.e. an arrangement of the data that takes into account several columns at once.
This multiple selection sorting is carried out using the <**Shift**>-button.
This is carried out as follows:

1. Hold down the <**Shift**> key.

2. Click on the first column that you want to sort, until the required sort direction is set.

3. If you then click on a second column whilst still holding the <**Shift**>-key, this column will also be taken into account when sorting the columns.

4. When you have finished selecting the columns for sorting, you can let go of the <Shift> key.

The following screen shot shows an example of the multi-stage sort:

Sortable Reference Lists

The functions for sorting and adjusting column widths described above also apply to reference lists. Clicking the column header of a reference list sorts the list and displays list entries in the desired order.

For this to function, you need to display reference lists as list view.

Group list entries

The PRO.FILE list view gives you the possibility to group the data records found in a list. All columns can be used for grouping. The different levels of the grouping can then be expanded or collapsed, depending on your needs.

The following example will explain this:

1. In order to group a list you have to click on the column you want to start your grouping with.

2. Then use the context menu to select the function "Group this column".
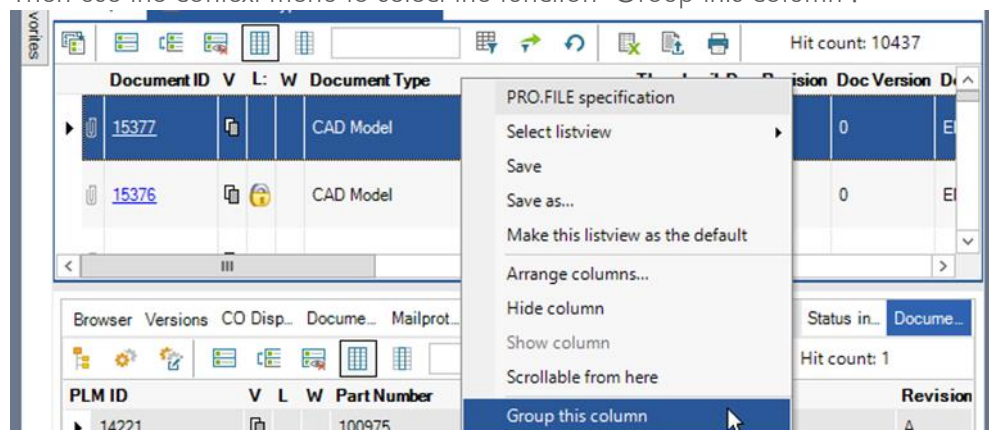
⇒ The first level of the grouping will now be displayed. The individual entries within this grouping can be shown or hid using the + and – symbols.

3. You can now include any other column into the grouping. Simply click the desired column header and use the mouse to drag it into the upper grouping area.
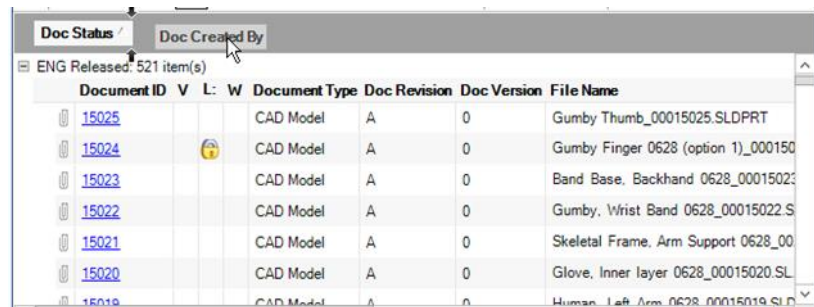
⇒ By doing so you can now include all column headers into the grouping. You can also use the drag and drop feature to rearrange your grouping. Additionally, the sorting functions of the lists will remain available.

4. In order to reverse the grouping, simply drag the column headers from the grouping area back to the list area.

Note:

A grouped list groups data from different data records with the same entries in the selected columns. The structure shown relates to the contents of the data records, and not to the link between the data records.

These links between the data records are shown in browsers, and are described in the following chapter "Working with Browsers".

Adjust column order and column width

Columns in the PRO.FILE lists can be moved to the required position using the drag & drop principle.

- To do this, click on the relevant column and hold down the mouse button whilst dragging the mouse pointer to the position in which you want to have the column. Once you have the mouse pointer in the required position, you can let go of the button.

- The width of the columns can also be altered, by moving the column separators apart in the column headers of the required columns.

- Additionally, double clicking a column divider will result in optimizing the column's width. The optimal width equals the maximum text length of data displayed in the column.

⇒ Once the list display has been optimized, the settings can be saved for future list views. The function "Save as", should be used from the context menu for list creation, as described in the chapter "Arrange list views and save them".

How can I filter results in lists?

In PRO.FILE, it is possible to only display the data records in a list that match specific selection criteria.

By activating the filter function and clicking on a filter selection in a column of a PRO.FILE list, you can select the desired values from the display of possible values. After that, the list is automatically reduced to the selected hits. Once you remove the filter, the full list is displayed again. Apart from this default filter you can also specify custom text filters.

Note:

The filter functions are not available if the list is displayed in a separate window.

To filter a list Proceed as follows

1. Open a list in PRO.FILE via one oft he search functions.

2. Select the icon ▼ "Display/hide filter" from the icon bar above the list:
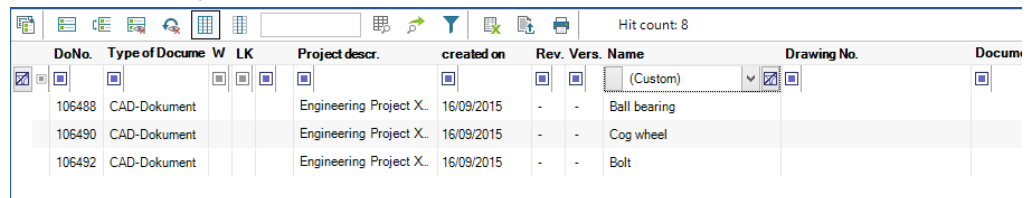
⇒ The list header now displays the function icons for the list filters.

3. Click the ⌄ icon to select the values from a list column, to which a filter is to be applied:
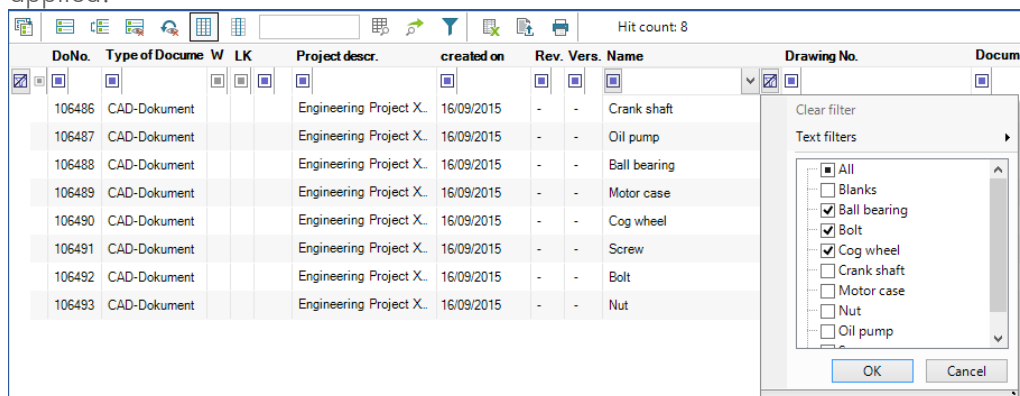
- Via the selection "All" you can activate or deactivate all options.

- You can now select the values to be used as filter.

⇒ The list is now displayed with the results according to the filter specified in the column header:

DoNo.	Type of Docume	W	LK	Project descr.	created on	Rev.	Vers.	Name	Drawing No.	Docum
								(Custom)		
106488	CAD-Dokument			Engineering Project X..	16/09/2015	-	-	Ball bearing		
106490	CAD-Dokument			Engineering Project X..	16/09/2015	-	-	Cog wheel		
106492	CAD-Dokument			Engineering Project X..	16/09/2015	-	-	Bolt		

Hit count: 8

4. For the filters via the ⌄ button, you can also set a text filter:

Clear filter

Text filters ▶ | Equals...
Does not equal...

☑ All
☐ Blanks
☑ Ball bearing
☐ Bolt
☐ Cog wheel
☐ Crank shaft
☐ Motor case
☐ Nut
☐ Oil pump

Begins with...
Ends with...

Contains...
Does not contain...

Custom filters...

OK   Cancel
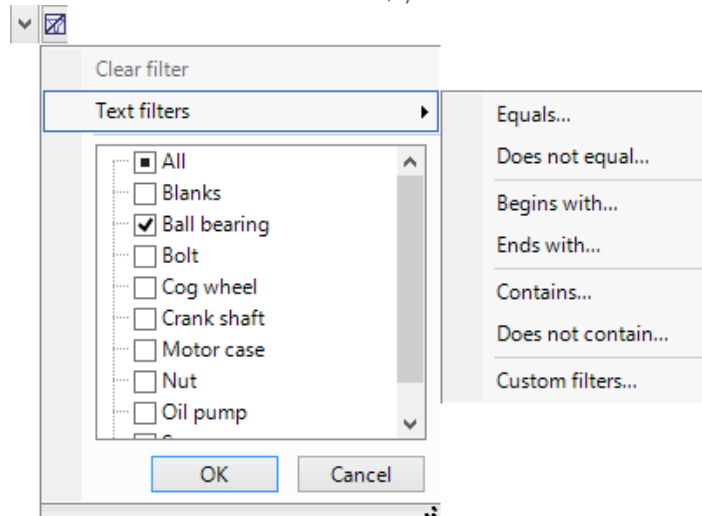
5. Furthermore, you can specify the filter type. To do so, click on the ▣ icon and select the desired function:

┄ Matches regular expression
Ⓐ Starts with
▣ Contains
Ⓐ Ends with
Ⓧ Does not start with
▣ Does not contain
Ⓧ Does not end with
┄ Does not match
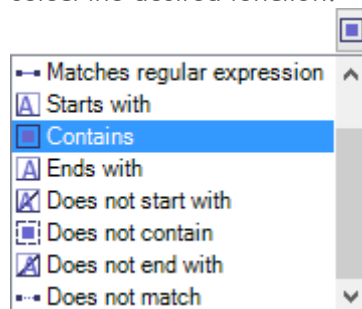
6. Finally, you can click on the ⌗ icon to remove the filter settings for a column.
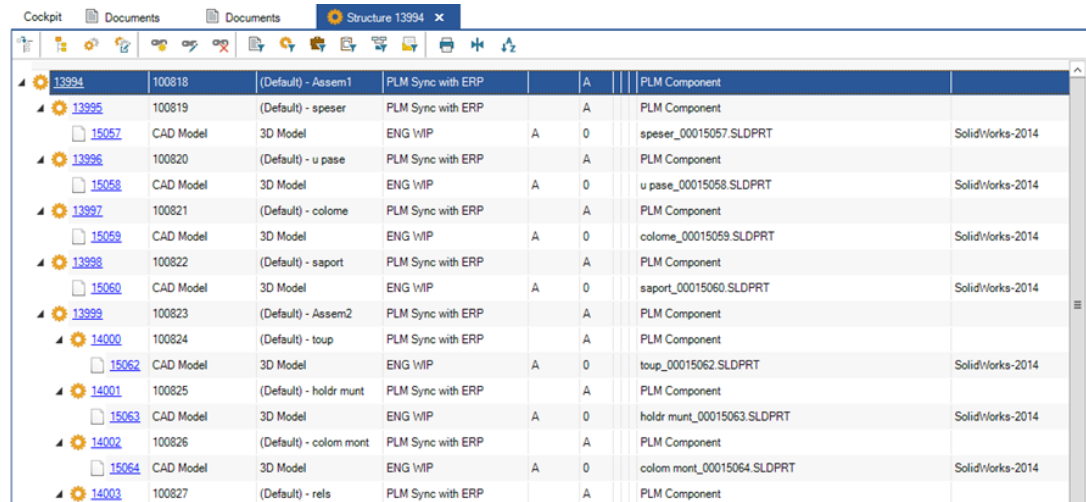
In order to delete the filter settings for the entire list, deactivate the filter function by clicking the ▼ icon in the icon bar of the list.

3.2.4   Working with Browsers

The third window type that is used for displaying data in PRO.FILE is the browser.

The browsers show graphically, the links and the structure between different data records. In this way you can link parts, documents, and projects. The structures that result from this, are displayed in the browser.

There are browsers for the general structure browser, the part usage browser and for the different bills of materials:

In the structure browser, as well as in the document- and part-structure, all linked objects are shown that are attached to this object (referring to the highlighted object).

- In the part usage browser, as in the document and the part usages, the structure is displayed backwards: The browser shows which structure the highlighted object is linked to, or built into.

- The structure is built into the bill of materials according to the position of the individual elements.

There are also other functions that can be used from the "Edit" tab or from the context menu, using the right mouse button.

This menu contains the most important commands that enable working with the browser. In the browser, the context menu is dependent on the highlighted object, and enables quick access to the functions for editing parts, documents, and projects.

Note for administrators:

Icons can be used in the structure browser like in lists.

The structure overview editor

If a structure overview is activated, it is possible to call up the command "Editor" from the context menu using the right mouse button, or from the "Edit" tab.
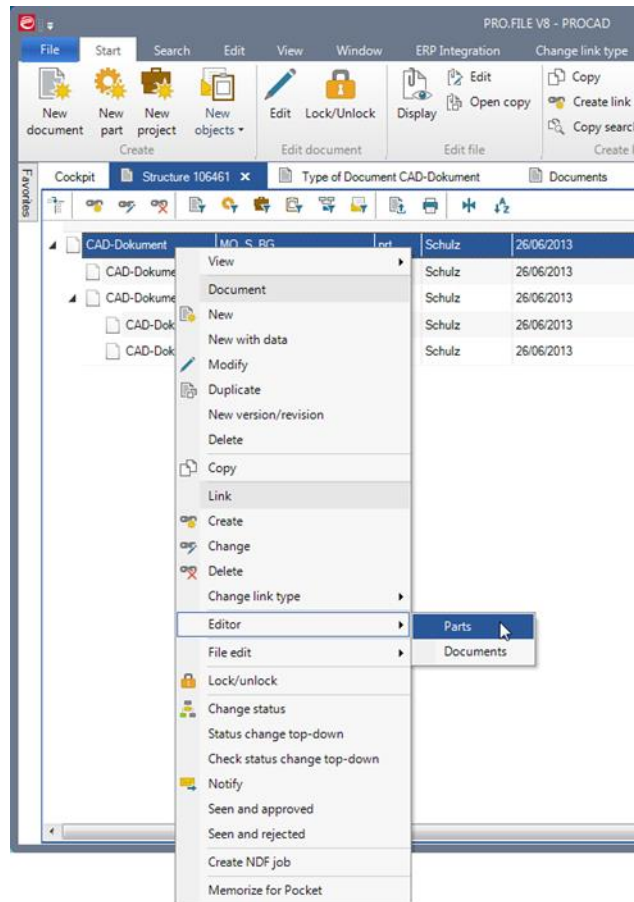
Using this function it is possible to edit the structure of documents and parts. Using the sub-functions:

- "Parts": For editing part- part- links

- "Documents": For editing document- document- links

The relevant editor will be called up.

The structures of the selected object types will then always be edited from the highlighted level.

Note:

This editor is only available for the structure overview, not for the proof of usage, and other browser presentations with backward-directional structures.

The reason is that the editing of the backward directional structures is an extremely complex procedure, and does not always lead to future directional results.

The following example shows the editor for the document- document- link:
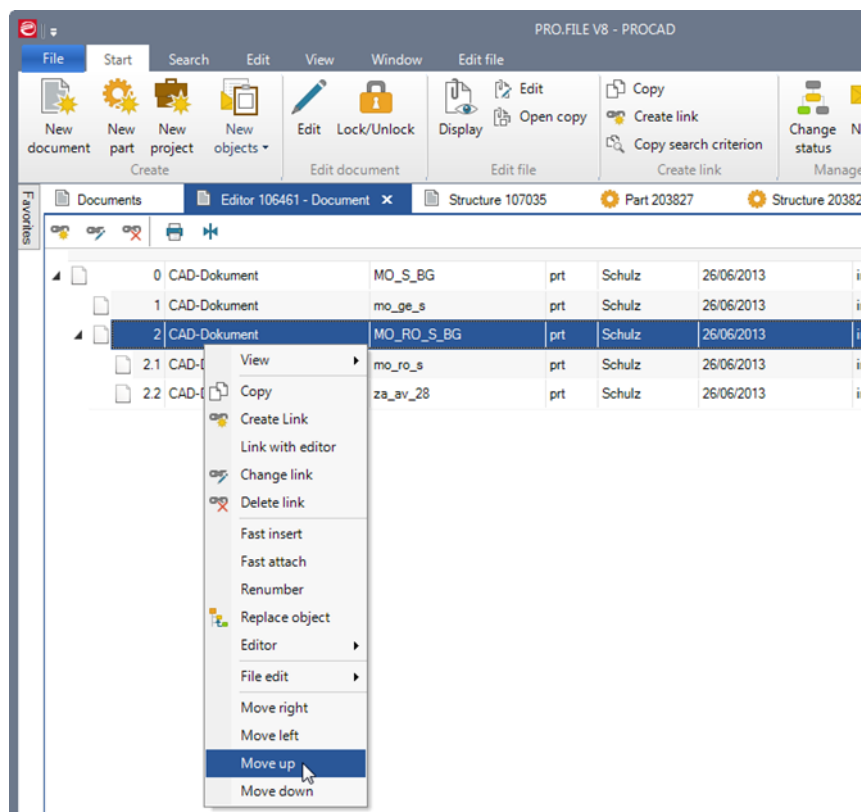
If the editor is activated, you can edit the structure overview using the "Edit" tab, or by accessing the context menu using the right mouse button.

Multiple selection in the browser view

In order to apply functions in the browser view to several objects at the same time, the browser view has a multiple-selection mode.

To use the multiple-selection mode, click on the icon [icon] "Toggle between single and multiple selection" in an opened structure browser. The icon can be found in the icon bar on the left in the structure tab.
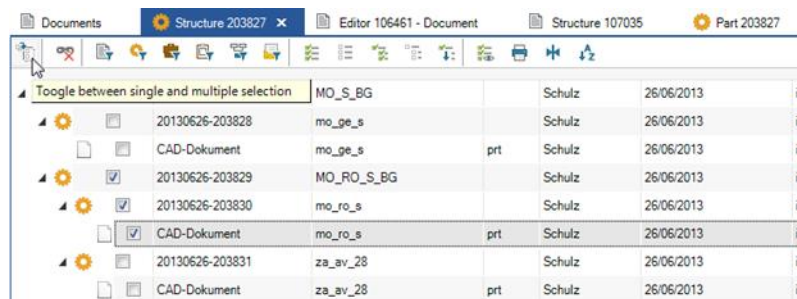
With the activation of the multiple-selection mode, additional icons become available:

- Select all (Ctrl-A)

- Deselect all (Shift-Ctrl-A)

- Select all visible sub-nodes(Ctrl-Click)

- Deselect all visible sub-nodes (Shift-Ctrl-Click)

- Expand all selected nodes (Alt-Click)

- Expand structure – 2 levels

- Expand structure – complete

- Open selected elements in new window

For all selected objects a collective function for the deletion of links can be called from the "Edit" tab.

For multiple selections of objects in a project structure, the context menu offers the following functions:

- "**Delete**": Deletes the link

- "**Type static**": Changes the link type to static

- "**Type dynamic**": Changes the link type to dynamic

- "**Type strong**": Changes the link type to strong

- "**Type weak**": Changes the link type to weak
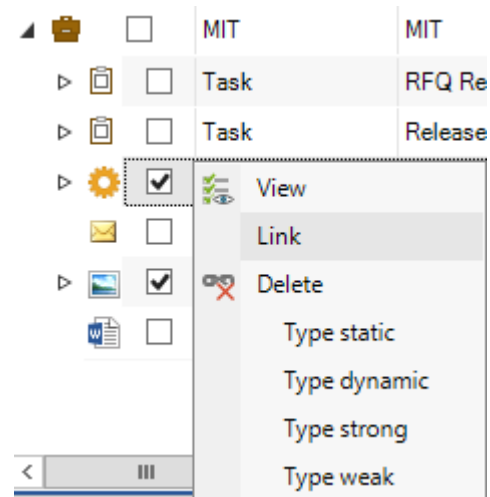
A detailed description of the link types can be found in the manual "Operation PROCEED Base".

Adjust the sorting

In structure views, like in lists, the sorting of the PRO.FILE objects can be adjusted, so that the results are sorted by several columns.

Search within the structure browser

When a structure browsers is displayed within PRO.FILE, the icons of the local toolbar above the browser offer various list functions.

The following buttons can be used for the searching within the displayed structure:

[   ] 🔲 Define search pattern / search:
A character string can be entered into the entry field located within the icon bar. Here you can use the wildcards/meta characters described in the chapter "Note: Optimize your search by using wildcards".
The wildcard "*" is not required all other wildcards can be used.

The search for the entered character string is started using the 🔲 icon.
If the search pattern is found, the respective data record becomes the active line. If the search string is not found, a message is displayed and you will remain in the active line.

- 🔍 Next found pattern:
  This icon is used to once again compare the entered filter pattern with the columns that are to be searched. The first data record found is then turned into the active line.

Proceed as follows

1. In a structure display or on the dependent tab "Browser" select the function "**Adjust sorting**" via the 🔼 button.

⇒ A separate window for adjusting the sorting criteria is displayed.
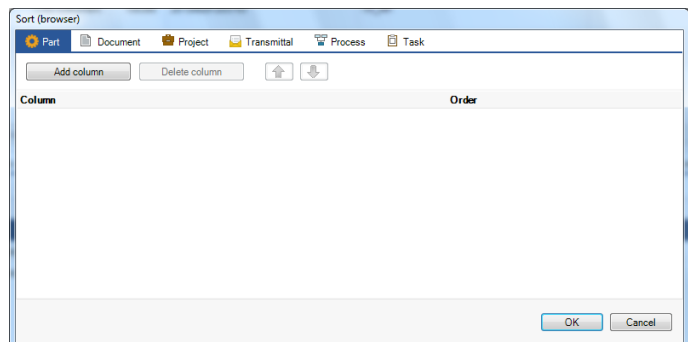
2. Select the object type, for which you want to adjust the sorting order.

3. Via the button "Add column" you can add new sorting criteria for the structure display.

4. Select the column of the structure display to be used for sorting.
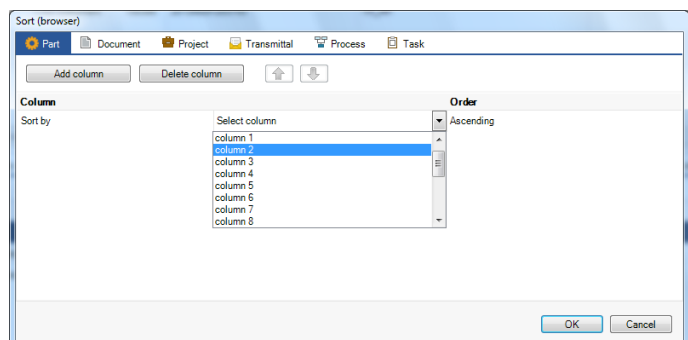
5. Then select the sorting order.
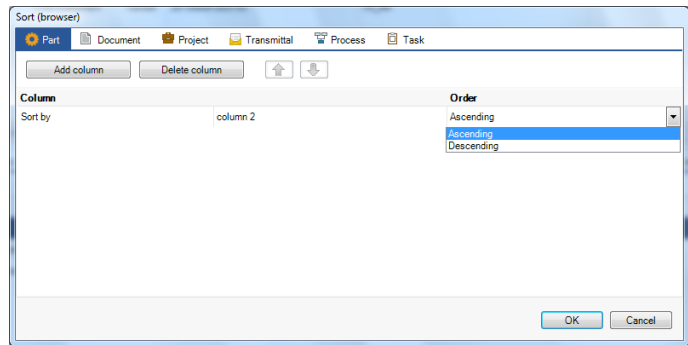
6. Via the arrow buttons, you can move the criteria upwards or downwards within the list.

7. Via the button "Delete column" you can remove a search criterion from the list.

8. Once all desired settings are made, confirm with <OK>.

⇒ The PRO.FILE objects are now sorted according to the specified columns.

Filter settings

It is possible to hide specific object types in the structure display. For this purpose you can find the following icons in the toolbar above the structure display:

Via these icons documents, parts, projects, tasks, processes or transmittals can be hiden in the displayed structure.

The example above shows the filter applied for parts. In the structure, all parts are hidden. As a consequence, all objects linked below any part is not visible, either.

Note: Are the filters only temporary or permanent?

Depending on the configuration, the filters can apply onyl for the current structure display or permanently. This depends on the configuration settings you administrator has made to the parameters in the PRO.FILE Management Console.

Relevant or irrelevant to bill of materials
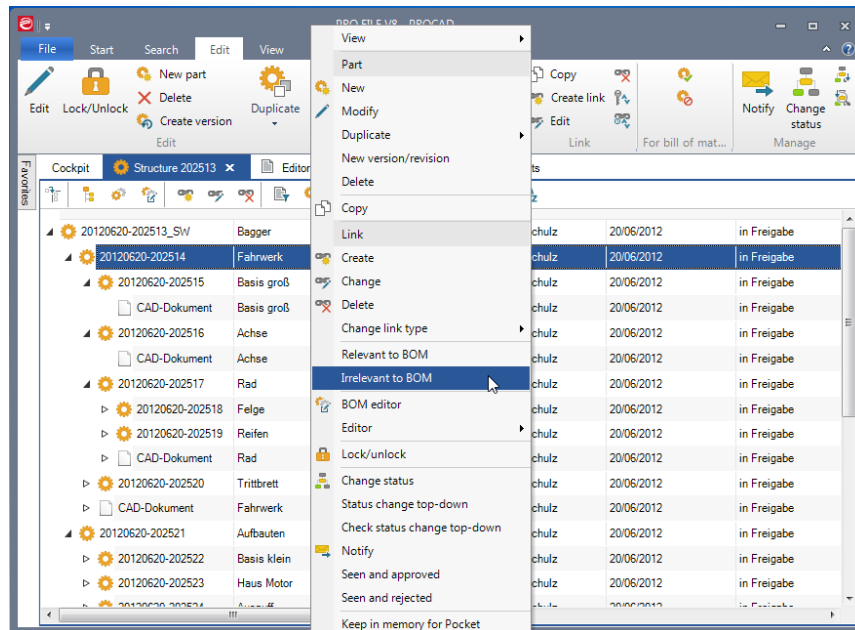
In the browser view you can select two functions, via the menu ribbon or the context menu, tot o hide or unhide specific positions from the bill of materials.

"Irrelevant to BOM":

With this function a part in the structure can be hidden from the bill of materials.

Function call:

Tab "**Edit**" => Group "**For Bill of materials**" => "**Irrelevant to BOM**"

The selected part is then no longer displayed in the bill of materials. In the browser view, the part is displayed with the 👆 icon.

This function is normally used for auxiliary materials or purchased parts, which are to be part of the structure but not to be contained in the bill of materials.

"Relevant to BOM":

With this function a part that has been hidden via the function "Irrelevant to BOM" can be re-activated for the bill of materials. The part is then displayed again in the bill of materials.

Function call:

Tab "**Edit**" => Group "**For Bill of materials**" => "**Relevant to BOM**"

Icons in the
structure views

The positions in a structure are characterized by different icons. These icons have the following meanings:

- 💼 Row 1: The project P2

- 🗂 Row 2: The task A1 below the project P2

- 🔗 Row 3: The project P22 below P2 with a weak project link.
This is important when dealing with parts and documents that are linked to P22 and also have to be considered in P2 for the evaluation of permissions regardubg the visibility due to the guest role in P22.

- 💼 Row 4: A strong project-project link between P2 and P21.
This is important when dealing with permissions to projects, parts and documents that are strongly linked to P2 and the evaluation oft he guest role in P21 also requires the evaluation of roles in P2.

- ⚙ Row 5: A strong, dynamic project-part link between project P2 and part 10487.
For the evaluation of permissions tot he part 10487 the roles in P2 are of major significance.
If the part 10487 is versioned, a new version of the part is displayed at this position.

- ⚙ Row 6: A bill of materials position. Zeile 6: Eine Stücklistenposition. Part 10488 is used in part 10487.

- 👆 Row 7: An irrelevant bill of materials position. This is a link between part 10487 and part 10489 that has been set as irrelevant to the bill of materials.

- 🔶 Row 8: The document 10400 is linked to the predecessor version of part 10487.

  This is a hint that the predecessor version of part 10487 has a document version but that a new version of the document 10409 is required so that each version of the part has a document version of its own.

- 📄 - 📥 Rows 9-11: The document 10401 is linked to part 10487. It contains the document 10402. The document 10402 in turn contains the document 10401. This is a cycle in the document structure. However, such a cycle may be designed in a CAD system under certain conditions.

- 📄 Row 12: A static part-document link between part 10487 and document 10404.
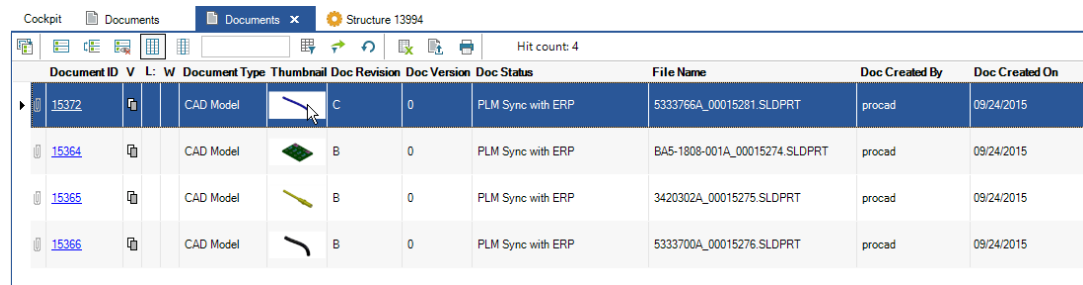
  If the document 10404 is versioned in the future, the link to the old version will remain, provided that there is no newer version of part 10487.

- Row 13: A strong, static project-part link between project P2 and part 10485. If part 10485 is versioned in the future, the newer version of the part will be linked to project P2, but the structure of P2 will still display 10485. With regard to permissions to part 10485, the roles in project P2 have to be evaluated.

- Row 14: A strong, dynamic project-part link between project P2 and part 10483.
This is important with regard to the visibility of part 10483. In this case, the roles in project P2 have to be evaluated. If part 10483 is versioned in the future, the new version of the part will be displayed at this place.

- Row 15: A weak, static project-part link between project P2 and part 10486. This is important with regard to the visibility of part 10486. In this case, the roles in project P2 have to be evaluated.
If part 10486 is versioned in the future, the same version of part 10486 will still be displayed at this place. The new version of the part will then also have a link to project P2.

- Row 16: A strong, dynamic project-document link. The same rules as for a strong, dynamic project-part link apply.

- Row 17: A dynamic document-document link between documents 10394 and 10399. In case that 10399 is not a CAD document: If document 10399 is versioned in the future, this link will be updated.

- Row 18: A static document-document link between documents 10394 and 10400. This link to this version of the document 10400 will remain, even if document 10400 is versioned in the future. This link to this version of the document 10400 will remain, even if document 10400 is versioned in the future.

- Row 19: A static, strong project-document link between project P2 and document 10397. The same rules as for a strong, static project-part link apply.

- Row 20: A strong, dynamic project-document link. The same rules as for a weak, dynamic project-part link apply.

- Row 21: A weak, static project-document link. The same rules as for a weak, static project-part link apply.

3.2.5   Displaying thumbnails in lists and forms

In PRO.FILE, each document can have a preview picture, a so-called "thumbnail" saved to it. When documents are dsplayed, either in the document list, the "Display document" form or the "Check out document" form, this thumbnail will be shown.

The thumbnails should ideally be in the Windows BMP format. JPG formats are also supported, but only in the case of no BMP being available. As a rule, all thumbnails have the same size, which is set in the PRO.FILE-configuration.

During the normal application of PRO.FILE, the thumbnail is filed by the integration when the geometry is saved. Also included in the standard package of PRO.FILE is an import program, which is able to create thumbnails for files that are already saved in PRO.FILE.

It is also possible, using menu functions to add or remove documents thumbnails.

Function call:

"Edit file" => "**Add Thumbnail**"

"Edit file" => "**Remove Thumbnail**"

You can save a file with an existing thumbnail format *.bmp or *.jpg from the file system. This file is then laid down in the appropriate place for thumbnails in the PRO.FILE system.

Note:

In order to add a thumbnail for a document, a document file has to be attached to the document description.

3.2.6   Printing forms, lists and structure displays

In the different displays (forms, lists, structure) of the PRO.FILE surface the displayed information can be automatically transferred to a printer.

For this purpose the icon 🖨 is available in the main tab and in the dependent tabs:
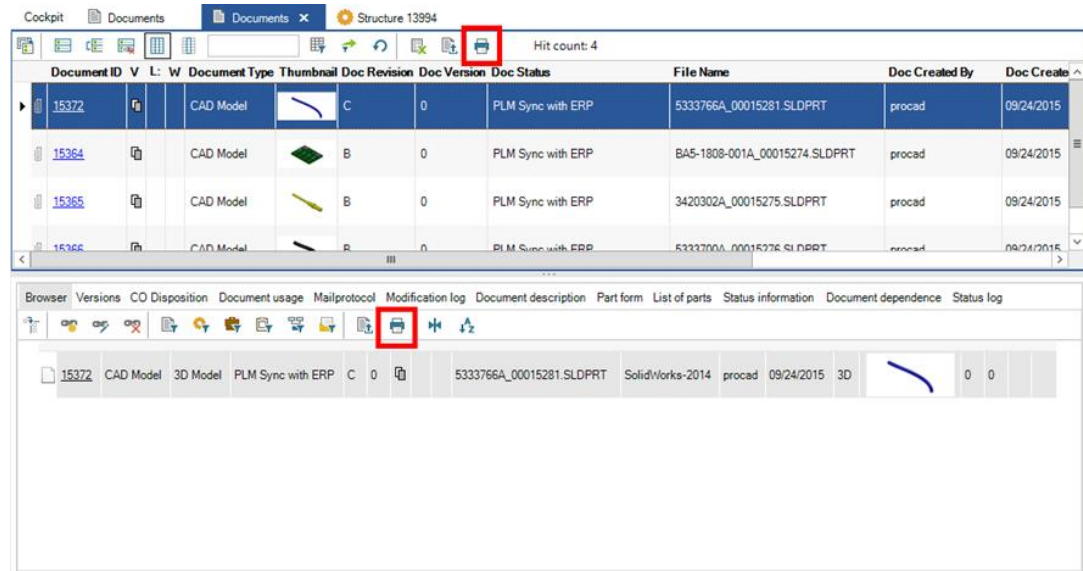
To print form, list or browser contents Proceed as follows

1. Activate the form, list or browser display you wish to print

2. Click on the button 🖨 in the icon bar belonging to the display

3. The data is now displayed in a print preview.

4. To print click on the button 🖨 or select the printing option from the "File" menu of this print preview.
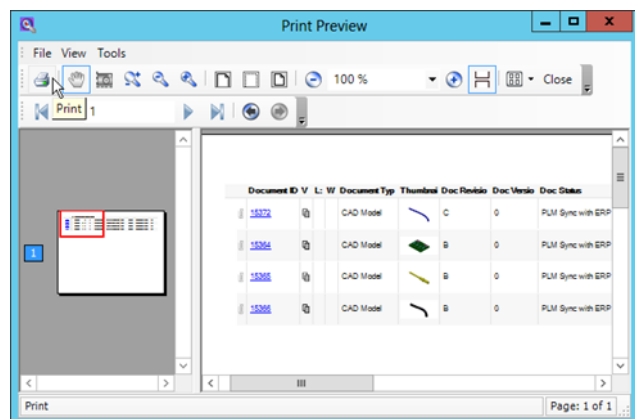
3.3   The file preview

Documents shown in list or form displays can be displayed in a preview window, so that the file does not have to be extracted from PRO.FILE for viewing.

The file preview displays the currently selected document, regardless of whether the document is selected in a main tab or a dependent tab.
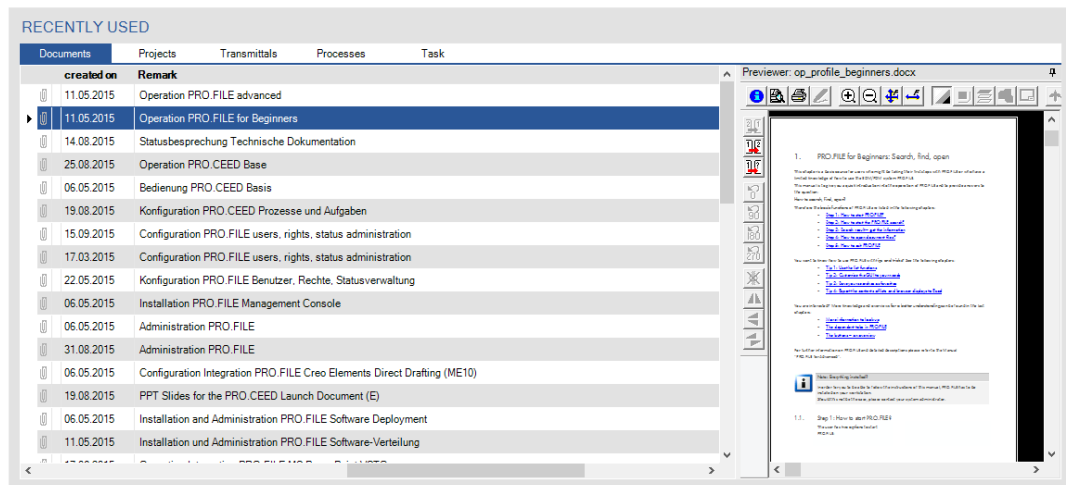
If the selected document cannot be displayed (e.g. because the corresponding viewer is not installed), the file preview shows a corresponding message.

The display of the file preview: Fixed or autohide?

The bar oft he file preview in PRO.FILE is, by default, displayed with autohide function.

The preview window always automatically hides at the side of the window when it is not required to leave more room for other information.

1. To show the preview window click on the tab "Previewer" at the right-hand side of the window.

⇒ The file preview is now displayed. It remains open until the mouse pointer leaves the area of the display window. Once the mouse pointer leaves this area, the window collapses again.
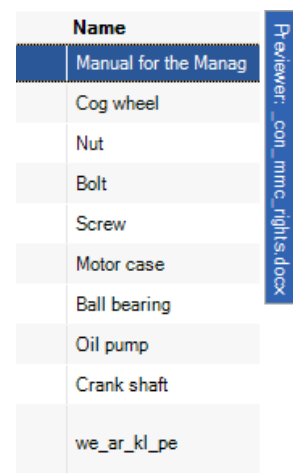
2. The preview window can also be fixiated via the ⊟ icon at the top right corner of the preview window.

⇒   The preview will then permanently stay open and can be used at any time.

3. When the preview window is fixiated, the autohide function can be reenabled by clicking the ⊟ icon.
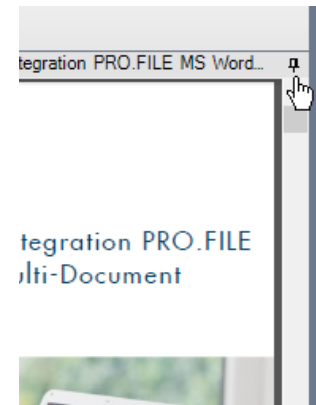
3.4   The dependent tabs in PRO.FILE

In PRO.FILE the user has the possibility to use the tab concept in forms and lists. With this Tap-concept the organization of the individual windows is more comfortable.

Each activated window is divided in two views. The selected data is shown in the upper view. All relating information can be displayed by using the tabs.
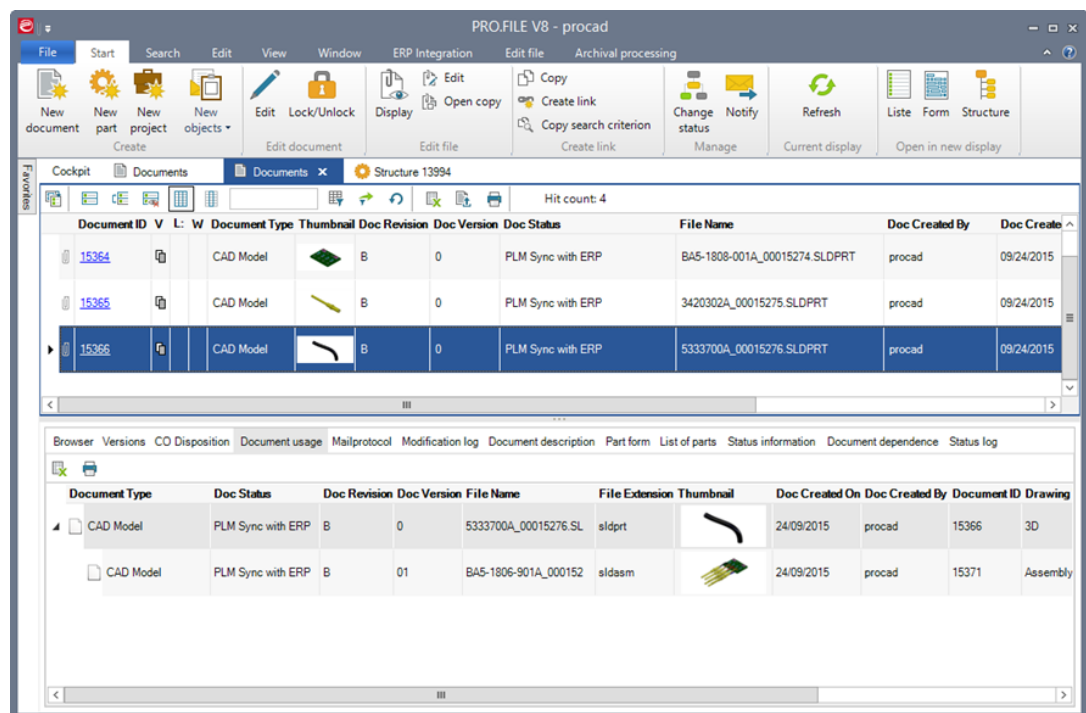
The tab concept is shown and described by the screenshot above:

A selection of documents was made and is represented in a document list.

For each document selected in the list the existing relating documents and information are shown in the relevant tabs. The above example shows the document usage of the document with the ID 15366.

These tabs can be used to display many additional views and information for a document or a part. It is also possible to display multiple tabs at a time:
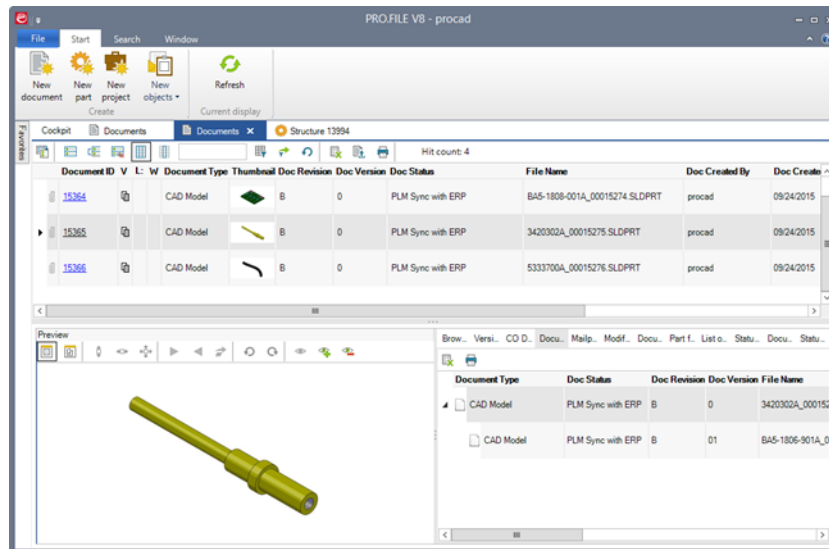
Note:

For larger structures or lists or large preview files, it may be advisable to deactivate the automatic update of the dependent tabs to reduce loading times. This can be done via the corresponding parameter in the PRO.FILE Management Console under "Configuration" => "Parameter" => "PRO.FILE" => "Form design". You should also make sure that these dependent tabs are not configured as first tabs to be displayed when a data record is selected.

Dependent tabs that are available for documents and parts:

- **"Modification Log":**
  The modification log displays the list of changes for the data record that is currently active in the list or the form view. This list of changes contains information such as, the user who applied the changes, the date of the changes as well as comments on the changes. The specific list functions are available for further modification of the list of changes. Please also refer to chapter "Available list functions".

- **"Status log":**
  Displays a list of the completed status changes stating the change date, the user in charge, and the status change comments. This allows you to retrace the sequence of the status changes of a selected document or part through the specified workflow within the company (e.g. from construction to manufacturing).

It is also recorded if a user has used the functions "Notify", "Seen and approved" or "Seen and rejected". Entries in the list of status changes are recorded by the system once an event is triggered. Here, information on the date, the individual who applied the changes and the status changes are included. Subsequent changes are not possible.

- Please refer to chapter "PRO.FILE status management: Support and Control your Workflow" for more information on the status system.

- "Status":
  The dependent tab "Status" provides users with further information on the current data record. This includes workflow status, project designation, information on who locked the data record, plus information on who opened an attached document and when.

- "BizTalk Log":
  If the BizTalk adapter is used, this is where the BizTalk log can be viewed. This log is used to record communication information between PRO.FILE and the BizTalk server.

- Browser":
  The structure overview (also called browser) gives users a graphical overview of the links of documents and parts. Starting from the currently active part, the subordinate structure is displayed here. Please refer to chapter "Working with Browsers"
  for more information on the functionalities of the structure overview. A context menu is always available within the structure overview that can be accessed through a right mouse click. It contains the most important commands to ensure ease of-use for this structure overview. The context menus within the browser are dependent on the selected object and allow users to gain fast access to the functions required for editing parts and documents.

- "Where used":
  The usage browser is available in PRO.FILE as a counterpart to the structure browser. It is intended to inform users on the usage of a part or document making it an aid to illustrating the backward structures. As opposed to the structure view, the PRO.FILE usage browser is used to show which objects a specific document or part is built or attached to, thereby giving a complete usage list for the selected object. Additionally, a context-sensitive editing menu gives users the possibility to manage and adjust the usage records. Please refer to chapter "Working with Browsers for more information on the functionalities of the usage record.

Dependent tabs that are available for documents in particular:

- "Preview ":
  This view will display a document in a preview window. The PRO.FILE preview window allows for the display and viewing of raster drawings in a PRO.FILE window without having to open the corresponding editor program. It is, however, required that the corresponding viewers and drivers are installed. Within this preview window, users can access the functions "Adjust", "Next page" "Previous page", "Zoom selection" and "Zoom out selection" by clicking the corresponding icon allowing them to zoom within the PRO.FILE preview tab. It is also possible to show the preview in a form and to then show it using a tab. It can also be included in a list as a thumbnail. Especially for larger files, these thumbnails offer distinct advantages: their transfer to the client is much faster and their format and small size enable a preview that is integrated into the list of documents. Please also refer to chapter "Displaying thumbnails in lists and forms".

- "Versions / Revisions":
  If a document is versioned, the database will contain older versions or revisions of the currently displayed document master data. This view will now list all of the available versions and revisions.

- **"Document structure "**:
  Uses a browser to show which documents are attached to the selected document and in which structure. This corresponds to the structure view but is limited to documents.

- **"Document usage"**:
  This shows a browser view of which documents the selected document is attached to thereby showing the backward structure. This view corresponds to the usage record, but is limited to documents.

- **"Part form "**:
  Displays all parts for the selected document that are attached to this document within a new form view. Please refer to chapter "Working with forms" for more information on the form view.

- **"List of parts "**:
  Displays all parts for the selected document that are attached to this document within a new list. Please refer to chapter "Working with lists" for more information on the list view.

Dependent tabs that are available for parts in particular:

- **"Browser"**:
  Uses a browser to show which parts are attached to the selected part and in which structure. This view corresponds to the structure overview but is limited to parts.

- **"Parts usage"**:
  This shows a browser view of which parts the selected part is attached to thereby showing the backward structure. This view corresponds to the usage record, but is limited to parts.

- **"Document description"**:
  Displays all documents for the selected part that are attached to this part within a new form view. Please refer to chapter: "Working with forms" for more information on the form view.

- **"List of documents"**:
  Displays all documents, which are attached to the selected part, within a new list. Please refer to chapter: "Working with lists" for more information on the list view.

- **"Bill of materials"**:
  Displays the bill of material that belongs to the selected part. Use the context menu of the right mouse button to access the bill of material editor from this view.

A configuration menu "Arrange tabs" is available to set up the tabs. It can be accessed through the context menu of the right mouse button. This context menu is available once the mouse pointer is placed over a tab that contains the names of the tabs. See also the chapter: "Setting up the dependent tabs".

3.5 The PRO.FILE fields: How can I enter data?

The following image shows an input form. In the following input form, which in some programs is called an input window, you can enter data into specific data fields.

The input forms are mainly used for selecting data records, creating data records, and when editing data records.
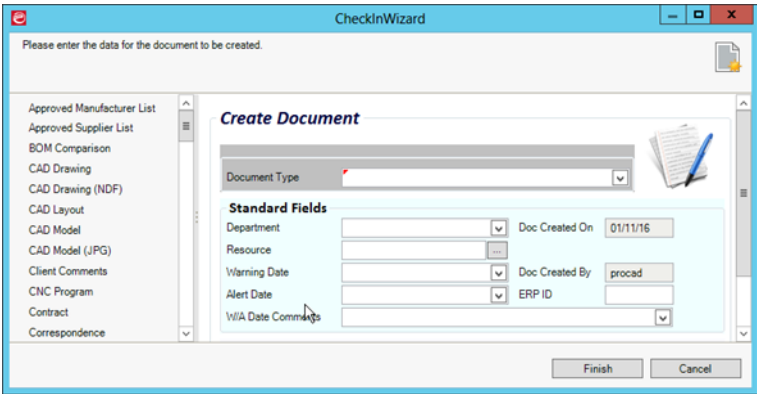
There are several types of fields

Form fields

The simplest element for the entry of data is the form field:

Drawing No.   123X

- In these fields, a previously defined number of characters can be entered and displayed.
- To activate an input field, click on it with the mouse and then type in the desired information:
- For selection use TAB or select the field by clicking on it with the mouse.

Multi-line fields

Multi-line fields provide unlimited space for unformatted text input.
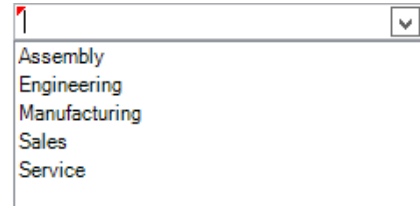
Fields with selection option (reference list)

Some fields are marked with a ▾ button; these fields offer a selection function via a reference list.

- If you click on the button, a drop-down list.

BOM Type

⌐	∨
Assembly	
Engineering	
Manufacturing	
Sales	
Service	

- You can select only one option from this list.

- Depending on the configuration of the field, you can also enter text that is not part of the reference list.

- As soon as text is entered into the field, the list of matching values is reduced automatically to make the input easier. The placeholder "*" can also be used in this context.

BOM Type
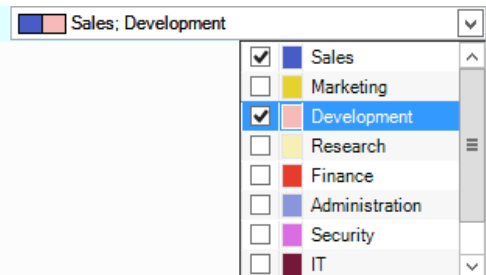
s	∨
Assembly	
Sales	
Service	

Fields with selection option (category list)
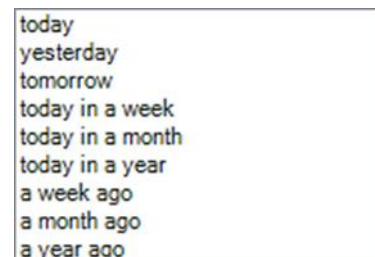
- By clicking the drop-down button, a list of categories is displayed.

- You can select several categories.

- The input of text that is not part of the list is not possible.

Department — Sales; Development

☑ 🟦 Sales	
☐ 🟨 Marketing	
☑ 🟪 Development	
☐ 🟨 Research	
☐ 🟥 Finance	
☐ 🟦 Administration	
☐ 🟪 Security	
☐ 🟥 IT	

Field for the selection of dates

- You can also access a special date selection function by using the ▾ button. With this, the values "yesterday", "today" and "tomorrow" can be chosen when creating or editing a PRO.FILE object.

today
yesterday
tomorrow
today in a week
today in a month
today in a year
a week ago
a month ago
a year ago

- Date fields may also have a date picker. This is to make the selection of a date even more comfortable via a calendar. The specification of a date range is only possible for search forms. The date picker has to be configured for the field (see manual "Configuration PRO.FILE GUI").
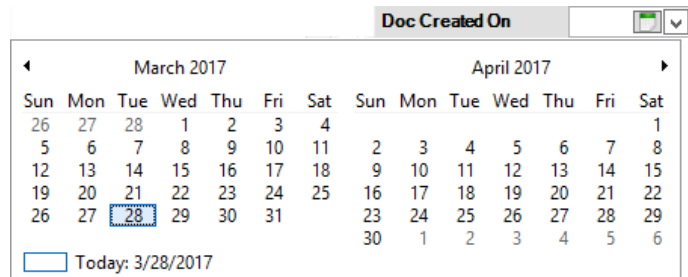
Reference fields

- Reference fields display values of superior objects. The icon next to the field value indicates the object type. The fields cannot be changed.

- Via the icon, the referenced object can be displayed in a separate form.

- Reference fields can be used for the search-
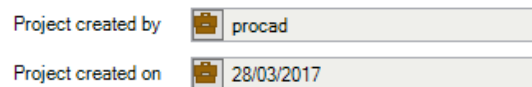
How to fill the fields

- Fields filled automatically by PRO.FILE:
  Some fields automatically receive a value from PRO.FILE, such as the DB Identification Number or the User (designer).

- Required fields:
  Some fields require an entry, you cannot quit without making an entry.
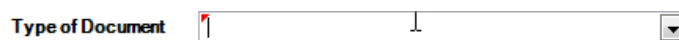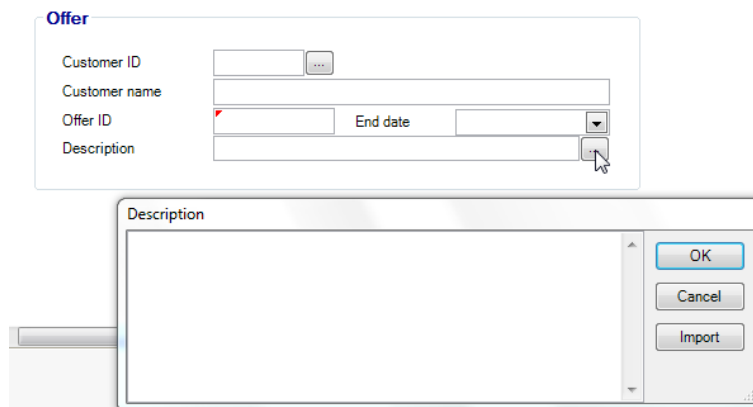
These fields are indicated by a red triangle in the upper left corner. If you try to confirm the input mask without making an entry in this field you won't be able to proceed and the required field is also marked with a red exclamation mark.

3.5.1 Use multiline-fields to present multiline texts

PRO.FILE multiline fields allow for data entry and storage of an unlimited amount of text data.

The configuration of multiline fields allows users upon creation or editing of data records to enter text data consisting of several lines and then display this data in output forms. The number of characters that can be entered in multiline fields is unlimited. A scroll bar is displayed that allows for navigation to text data that resides outside of the viewable area of the multiline field.

Text data entered into a multiline field is stored separately in the database and can be displayed in output forms. Multiline fields are available in conjunction with documents and projects.

Multiline fields are configured using designated database fields provided in PRO.FILE Management Console. Up to 5 multiline fields for each form can be configured. Multiline fields can be inserted in forms using the form designer.

Displaying multiline entries in lists:

If a multiline field contains a long entry or an enty with several lines, the corresponding field in the list is displayed with a height of 3 lines.

When a row is selected in a list and copied to the clipboard, only the first line of the multi-line field entry is copied.

The PRO.FILE Multiline Editor

PRO.FILE offers a multiline editor for working with text data in multiline fields. The multiline editor simplifies data entry and also features a function for importing data into a multiline field.

In the data entry form, click the button ⌨ for entering or editing text data in a multiline field.
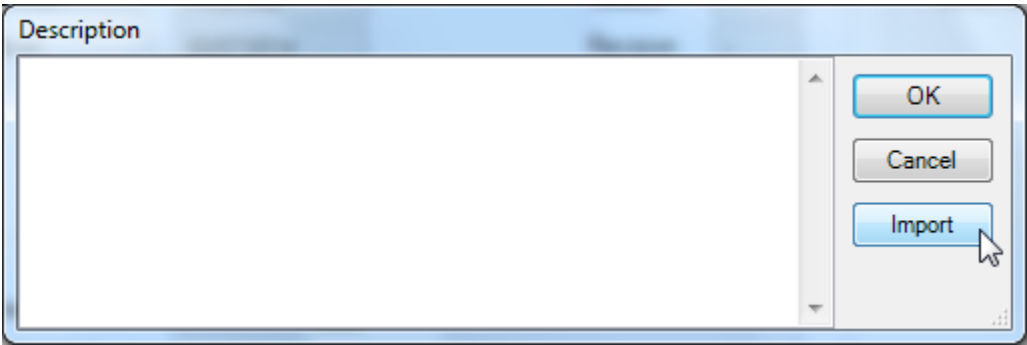
The multiline editor will then be displayed, and the changes can be made to the text. You now can modify or enter data in the window. The length of text data entered is not limited.

The editor window allows for modification and update of existing text. An import function allows for import of entire text files. The editor window is fully sizable (click & drag) following common Microsoft Windows standards.

Right-clicking the mouse inside the editor window will display a menu featuring "**Undo**", "**Cut**", "**Copy**", "**Paste**", "**Delete**", and "**Select All**" text editing commands.

When finished with updating text data, click the <**OK**> button to assign the text data to the multiline field. Then, contents of the editor window will be displayed as data in the multiline field.

3.5.2   Category fields

Selection fields may contain a list of categories. The configuration for the categories is made by the PRO.FILE administrator in the PRO.FILE Management Console. In contrast to reference lists, category lists allow the selection of mutliple values, i.e. an object can be assigned to several categories.

Assign categories

Category fields facilitate the fast and simple assignment of objects to categories with customizable color flags.
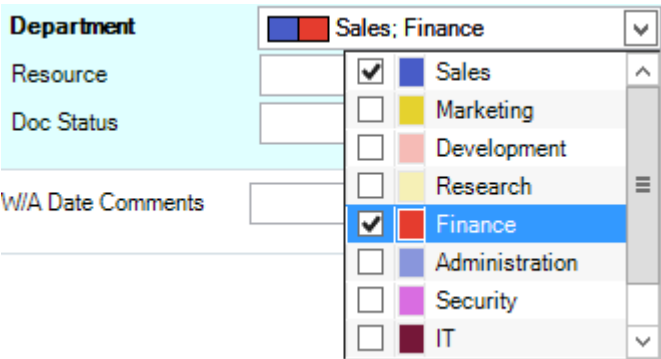
You can select multiple categories by activating the corresponding checkboxes.

The field then displays the color codes of the selcted categories.

Note:

When a category is disabled by the administrator, it is still displayed in the list (grey) but cannot be selected. If a data record, that contains a category that has been disabled in the meantime is modified, you can uncheck the category for this record. The category is then also disabled for this record

Search for categories

For the search, the context menu of a category field offers specific options.

1. Righ-click on a category field to open the context menu.
2. Select from the following options:
   - **Has categories**: Searches all objects that have been assigned categories.
   - **Does not have categories**: Searches all object that have not been assigned categrories.
   - **Purge field**: Removes the current setting from the field.

   ⇒ The selected option is displayed in the field.

Category filter

In lists and browser displays, you can set a filter for categories.

1. Click on the ▼ icon.

   ⇒ In the column header filter field, the available values are displayed

   ⇒ The list displays only values that are actually used within the list of results.

2. Select the category you want to include in the filter. The cateogory names are displayed as tooltips. If several categories are selected, an "OR" connection is established.

   ⇒ The results list is reduced to all records the filter applies to.

Category groups

If the results list is grouped by the column of a category field, a new group is createf for each combination of categories.

3.5.3   Enhance reference lists directly in PRO.FILE

A reference list can be enhanced directly in PRO.FILE but only if you have the corresponding function access right.

As described in the previous chapter, a reference list may either be used as a pure selection function – or may be connected with a check function, allowing only entries from the reference list.

If reference lists are used in such way to ensure the correct filling of fields, only entries from the reference list are allowed.

> **Example:**
>
> You are using this check function to fill the field with a selection of part materials, in order to avoid data inconsistencies caused by wrong entries of material names or numbers.

If such a reference list with check function is to be used, there are two options:

- The PRO.FILE administrator enhances the reference list via the reference list administration in the PRO.FILE Management Console.

- You have the function access right "Enhance reference list. Then you can enter a new value into the field, which will enhance the existing reference list by the new value.

> **Note:**
>
> In order to enhance a reference list with a check function directly in PRO.FILE, the user needs the corresponding function access right "Enhance reference lists". This function is only available for the Windows Client.

How to enhance a reference list?

In order to enhance a reference list with a check function directly in PRO.FILE, Proceed as follows

> **Note:**
>
> In order to enhance a reference list with a check function directly in PRO.FILE, the user needs the corresponding function access right "Enhance reference lists".

1. Requirement:
    The reference list "Screw" shown here is to be
    enhanced by the entry "Wood screw".
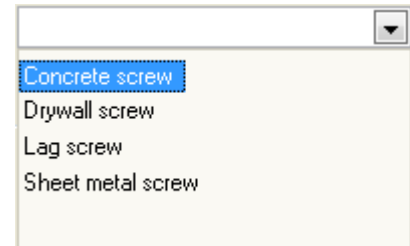
2. Enter new reference list entry into the field
    Enter the value "Wood screw" into the entry field.

3. Call up reference list enhancement
    Click the drop-down button of the reference list with the mouse button.
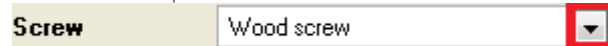
4. Confirm enhancement:
    The query "Would you like to enhance the
    reference list?" is displayed.
    Since this is what you want, confirm with
    <Yes>.
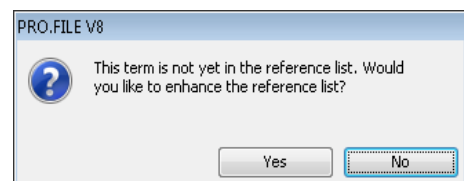
5. Check the necessity of this entry
    In the wizard that appears now, check
    whether you really need the new entry or
    whether an according entry already exists.
    If you want to create the new entry, select
    "Wood screw" and click <Forward>.
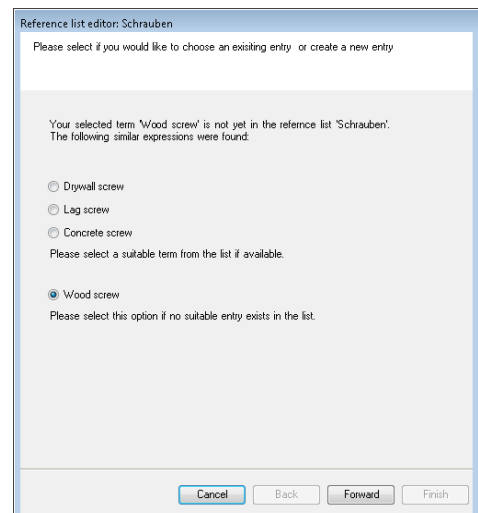
6. Select superior level
    You now have to decide, on which level
    the new entry is to be inserted. For this
    purpose, select the superior structure
    point in the reference list.
    The new reference list entry will be
    inserted one level below the selected
    entry.
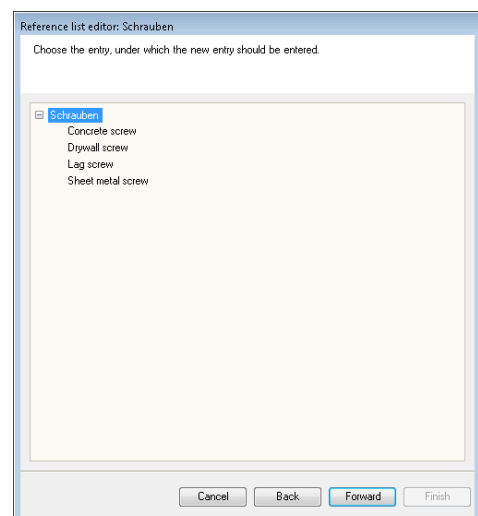
7.   **Select subordinate levels**
     If the new reference list entry is to form a
     new structure within the reference list
     (thus to be inserted between two existing
     structure levels), you must now select the
     reference list entries that are to be
     attached below the new entry.

     If all entries are to be on the same level,
     do not select anything here.

     In this example, the "wood screw" is to be
     on the same level as the other screws, so
     nothing is selected here.

8.   **Determine display of entry in reference
     list**
     Finally, you can determine how the new
     entry is to be displayed in the reference
     list. This option is used to keep reference
     lists easy to handle by displaying only
     short forms of the entry in the list, but
     which will enter a longer value into the
     field.

     Examples:
     Entry in reference list: O
     Entry in field: Oxygen

     Entry in reference list: GTC
     Entry in field: General terms and
     conditions

9.   **Completion:**
     To complete the enhancement of the reference list, click on <**Finish**>. The new
     entry can now be selected from the reference list and is available to all other users.

3.6   The PRO.FILE data fields: Working with SmartLinks

Hyperlinks are an established tool in many areas of IT. Via a single mouse click, a user can jump from one object to another. PRO.FILE picks up this comfortable method with the new PRO.FILE SmartLinks.

- Links can be configured for PRO.FILE fields in forms and lists. These links establish a connection to documents and assemblies, between documents and projects, between processes and parts, etc.

- Another usage scenario is the access to internet sites directly in a PRO.FILE window.

- The SmartLinks can also be placed on the desktop of a PRO.FILE user or within a company portal. This way, it is possible to jump directly to a PRO.FILE object from the outside and vice versa.

SmartLinks in PRO.FILE allow to jump:

- From…
  a field entry
    - in a form display
    - in a list
    - in a browser display

- …to
    - a different PRO.FILE object (form or list display)
    - a web site
      (Web tab directly in PRO.FILE or external browser)
    - a user-defined function (user exit

Examples:

In the document list you can directly access the corresponding project by clicking on the project number.

⇒ SmartLink "**Object link**"

Project n o.   10486

Project name   Test [Open project 10486 of customer PROCAD GmbH & Co. KG]

Via the entering of the URL into a field with configured SmartLink you can access the web site of the supplier on a new PRO.FILE tab.

⇒ SmartLink "**Web link**"
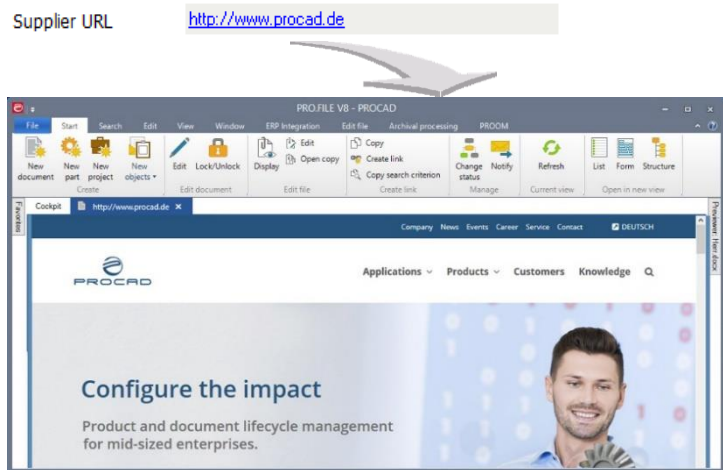
Furthermore, the SmartLinks offer the following options:

- [The context menu for opening, linking and copying a SmartLink](#)

- [Creating links from SmartLinks via drag & drop](#)

3.6.1   The context menu for opening, linking and copying a SmartLink

If you move the mouse over a SmartLink in a list or form view, you can access a context menu via the right mouse button.
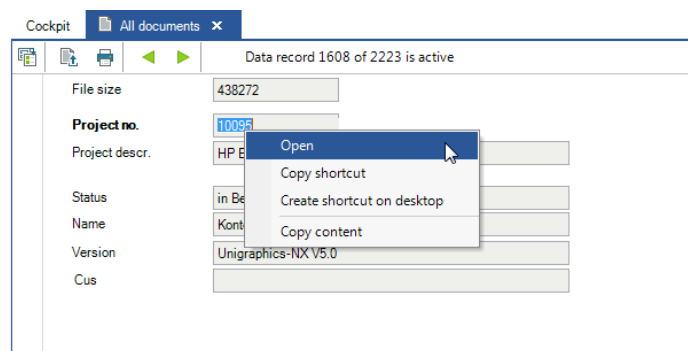
This menu offers the following functions:

- **Open**
  This function corresponds to the left mouse click on the SmartLink. The PRO.FILE object linked via the ID number (document description, part, project, …) is opened and displayed in a new tab in PRO.FILE.

- **Copy shortcut**
  This function copies the link contained in the SmartLink to the Windows Clipboard.
  You can copy this link into other documents or applications. A mouse click on the link opens PRO.FILE and displays the linked object.
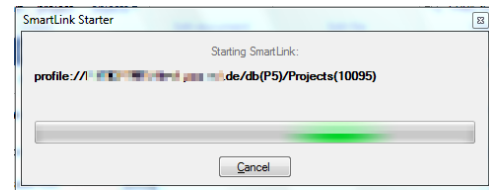
- **Create shortcut on desktop**
  This function creates a link instance of the SmartLink on your Windows desktop. With a mouse click on this shortcut PRO.FILE is started and the PRO.FILE object linked via the ID number is opened and displayed in a new tab in PRO.FILE.
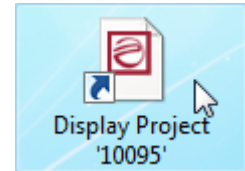
- **Copy content**
  This function copies only the content of the displayed SmartLink, i.e. the character string which is displayed as link signifying the SmartLink.

3.6.2   Creating links from SmartLinks via drag & drop

A SmartLink be used for the creation of shortcuts and hyperlinks via drag&drop.

Drag the SmartLink with the left mouse button from the form or list view to the desired target location.

- Drag&drop of a SmartLink from PRO.FILE

  - to the Windows desktop creates a shortcut

  - to an Explorer folder creates a shortcut

  - into an MS Word or Outlook document creates a hyperlink.

By clicking on the thus created hyperlink or shortcut, PRO.FILE is opened and displays the PRO.FILE object linked via the ID number of the SmartLink.

3.7   Tip: Customize the GUI to your needs

You can customize the PRO.FILE GUI according to your daily requirements:

- [Setting up the dependent tabs](#)

- [Arrange list views and save them](#)

3.7.1   Setting up the dependent tabs

The "dependent tabs" can be displayed in forms and lists. These dependent tabs allow you to directly view additional information for an object that is active in the form or list view.

Within the PRO.FILE user interface, this information is displayed in the lower corner of the tab windows in the dependent tabs

A configuration menu is available to set up the tabs. It can be accessed through the context menu of the right mouse button.

This context menu is available once the mouse pointer is placed over a tab that contains the names of the tabs.
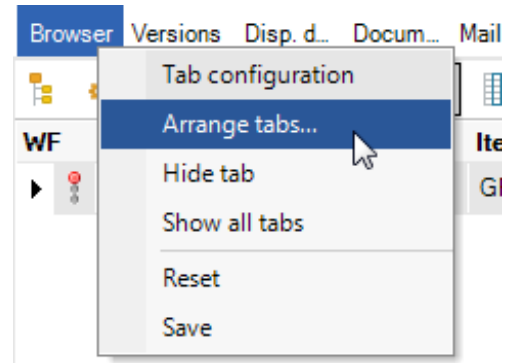
Function call:

"Place mouse pointer over tab" => "Right mouse button"

The functionalities that are described in the following chapters will then be available for configuration:

- Hide a dependent tab
- Display all dependent tabs
- Arrange dependent tabs
- Split the tab window in order to see multiple tabs at a time
- Reset the settings for the dependent tabs
- Save settings for the dependent tabs

Note:

The available tabs are dependent on the object type that is currently active. The tabs can therefore be configured separately for documents and parts.

The settings for the dependent tabs are stored locally on the current user computer and are only available there.

Hide a dependent tab

1. If you want to hide a dependent tab, simply place you mouse pointer over the desired tab.

2. Then select the function "**Hide tab**" from the context menu that is activated using the right mouse button.

⇒   The currently active tab will then be hidden. In order to redisplay a tab that is hidden, please also refer to chapter "Arrange dependent tabs".

Display all dependent tabs

Individual dependent tabs can be hidden from the document or part view.

If these tabs have to be accessed again at a later time, you can use the function "**Show all tabs**".

1.   Place you mouse pointer over the header of any dependent tab in order to call this function. Then select "**Show all tabs**" from the context menu.

⇒   All dependent tabs that are available for the current PRO.FILE object type will then be displayed.

Arrange dependent tabs

1.   Place the mouse pointer over a dependent tab. Then press the right mouse button and select the function "**Arrange tabs…**" from the context menu.

⇒   A new window will appear:

Tab configuration

☑ List of parts
☑ Where used
☑ Status information
☑ Document dependence
☑ Document usage
☑ Status log
☐ Fabrication orders - %04ld
☐ Calculation data
☐ Deleverers
☐ ERP Integration Log
☐ Prizes - Stock
☐ Structur bill of mat. from KIFOS
☐ Web reports
▲ Group 1
   ☑ Preview

[OK] [Cancel] [Reset] [New group]
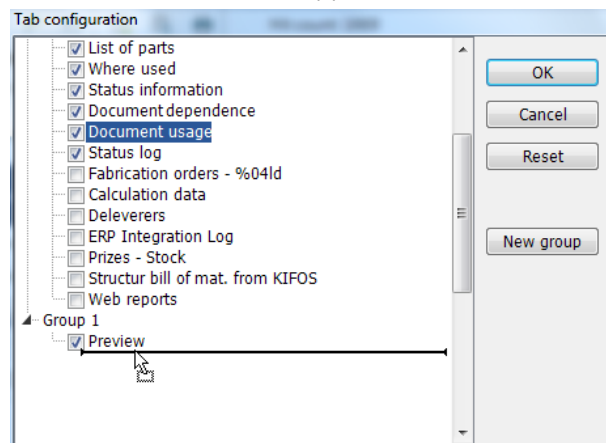
2.   Using drag and drop you can now move every entry to the desired position.

3.   It is also possible to activate or deactivate individual dependent tabs using the checkboxes in front of the tab designation. This is how you can redisplay any hidden tabs as well.

4.   When you have arranged the tabs confirm your selection by pressing the <**OK**> button.
In order to discard possible changes and to return to the existing arrangement of tabs simply press the <**Cancel**> button.
In order to return to the default settings simply press the <**Reset**> button.

Split the tab window in order to see multiple tabs at a time

You can set up groups within the tabs in order to display multiple tabs at a time. The following illustration, for example, shows how the preview tab is arranged on the left hand side while all other tabs are placed on the right hand side:
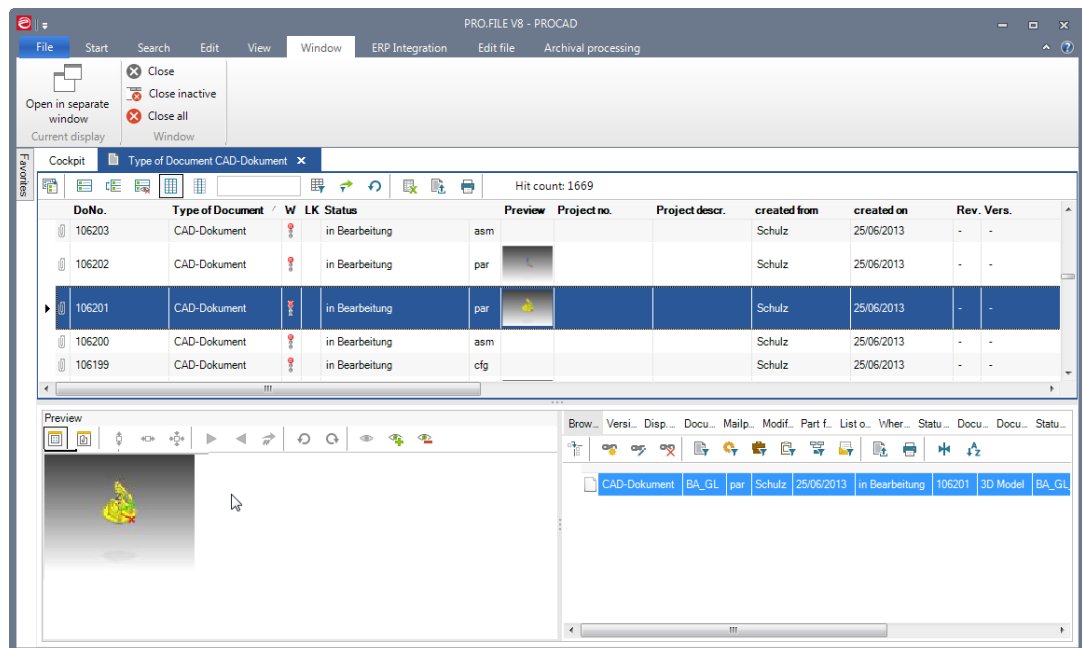
In order to subdivide the tab window into several tab groups, please follow these steps:

1. Place the mouse pointer over the header of a dependent tab. Press the right mouse button and select "**Arrange tabs…**" from the context menu.

2. A new window will appear. Press the <**New group**> button.

⇒ A new Group 1 will be created within the list:
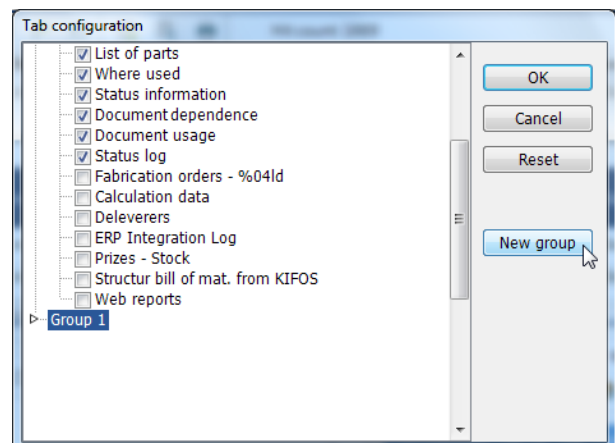
3. Using drag and drop, now move the tabs that you want displayed in a second window from the upper list ("Main") to "Group 1".
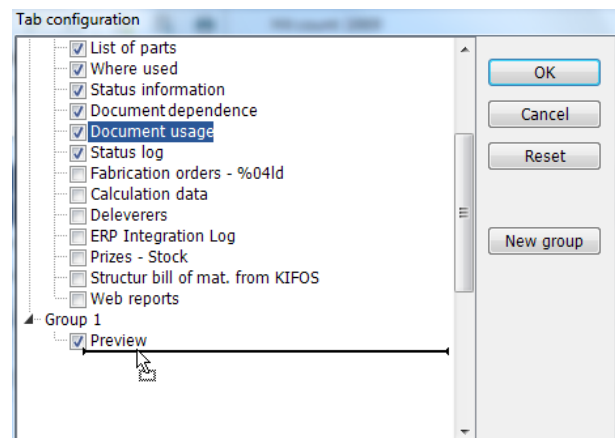
4. Confirm your settings by pressing the <OK> button.

⇒ The tabs will now be displayed within multiple groups in the PRO.FILE user interface.

Undo the subdivision of the tab window

1. Place the mouse pointer over the header of a dependent tab. Press the right mouse button and select "**Arrange tabs…**" from the context menu.

2. Now move all entries within the additional groups back to the "Main" list. If a group doesn't contain any more tabs, it will be automatically deleted upon confirmation of your selection with <OK>.

Reset the settings for the dependent tabs

1. Place the mouse pointer over the header of a dependent tab. Press the right mouse button and select "**Reset**" from the context menu.

⇒ Availability and arrangement of the dependent tabs will be set back to the default settings.

Save settings for the dependent tabs

If you choose to hide individual dependent tabs and to arrange the remaining tabs according to your wishes, you should save your settings so that they will be available to you for the next session!

Follow these steps to save you settings for the dependent tabs:

1. Place your mouse pointer over the header of any dependent tab. Then press the right mouse button and select the function "Save" from the context menu.

⇒ The current settings will be saved and will be available the next time you use the respective tab view.

Note:

Which tabs are available depends on which object type is currently active. The tabs are configured separately for documents and parts and therefore have to be saved separately as well.

3.7.2   Arrange list views and save them

There is always a context menu available to the user in the hit lists, document lists and the part lists. Using this context menu, you can create the lists, edit them, and also save their displays.

To call up this context menu, position the mouse pointer in the list header with the column headers, and click the right hand mouse button:
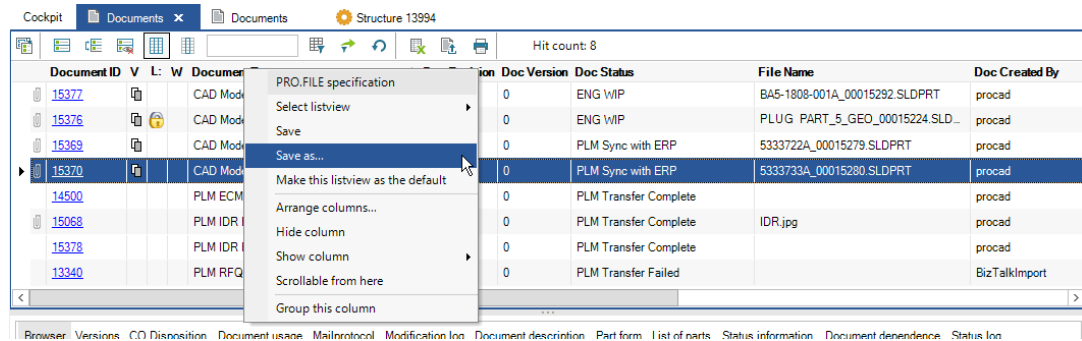
The following functions are available:

- **The information on the currently selected list view:**
  You can save lists that you have previously configured yourself, and reselect them at a later date. The first line of the context menu shows you which list view are presently selected.

- **Select list view:**
  This menu point can be used to select and call up all available list views.

- **Save:**
  This function is used to save changed displays of a list view. This function relies on the specific user authority.

- **Save as:**
  This function saves changes to a display of a list view under a new name. During the save as process, a new name must be given to the newly created list view.

- **Make this list view as the default:**
  This command enables the presently activated list view to be set as the standard view in its' present saved state. If a new list is called up, it will always appear in this standard view format.

- **Arrange columns:**
  This command opens a dialog in which you can quickly and easily specify the columns to be displayed and in which order.
  For this purpose, columns are shown or hidden via the arrow buttons. The order of the columns is then determined with the buttons <**Move up**> and <**Move down**>.

- **Hide column:**
  This command hides the presently active column from the list view. Each active column is marked with a small arrow in the column header.

- **Show column:**
  This function is used to blend in previously blended out columns, to make them visible again. In the sub-menu of this function, is a list of all of the blended out columns.

- **Scrollable from here:**
  This function determines which columns are to be seen in the view. If a column is activated and this function is called up, all columns to the left of the activated column can no longer be scrolled away, and are remain visible in the view. (The column that is active at the time is shown with a small arrow in the column header).

The **view manager** is used for the administration of the self-created lists. The various functions of which, can be found in the following chapter "Manage stored list views".

Manage stored list views

You can create and customize lists in PRO.FILE so that they fulfill your individual requirements: You make all the settings that determine blend out, or blend in, sort, the changing of the column order and the column width.

These customized views can then be saved. (See also the chapter "Arrange list views and save them").

The views manager is used to carry out the administration of all of the saved list views.

Function call:

"View" => "Views Manager"

Using the view manager it is possible to delete, rename, or publish saved list views.
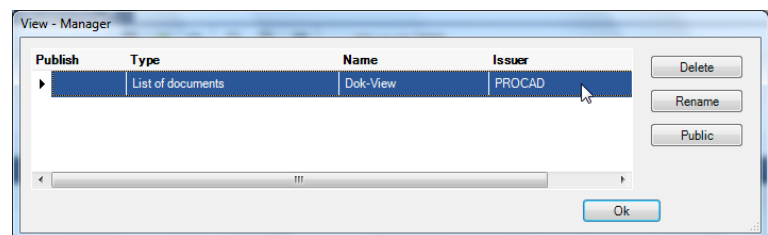
For this, on the right hand side of the window, you have the three corresponding buttons:

- **<Delete>**:
  Irrevocably deletes the highlighted view. Recovery of this view is then **not** possible! After this function has been called up, a request screen appears in which you must either confirm or cancel the delete process. Only the customized view will be deleted – none of the list entries or data records.

- **<Rename>**:
  This function can be used when saving a customized list, that has a name that does not describe the view too well, or when all saved lists should be renamed according to a specific scheme. To do this, the list view that is to be renamed must be highlighted, and the <**Rename**> button selected. A window will appear in which the new name can be entered. The renaming should then be confirmed with <OK>.

- **<Public>**:
  Using this function you have the possibility to make your created, customized and saved lists available to other PRO.FILE users. This requires you to have the relevant user authority, and only applies to PRO.FILE users that have access to the same database. To publish your lists, highlight the list views required and click on the <**Public**> button.

Published views will then be marked with the symbol:

3.8 Export the contents of lists and browser displays to Excel

With the button you can export the information displayed in different lists and browser displays in PRO.FILE into an Excel file.

The export of such displayed data can be made from the main tab as well as from the dependent tabs.
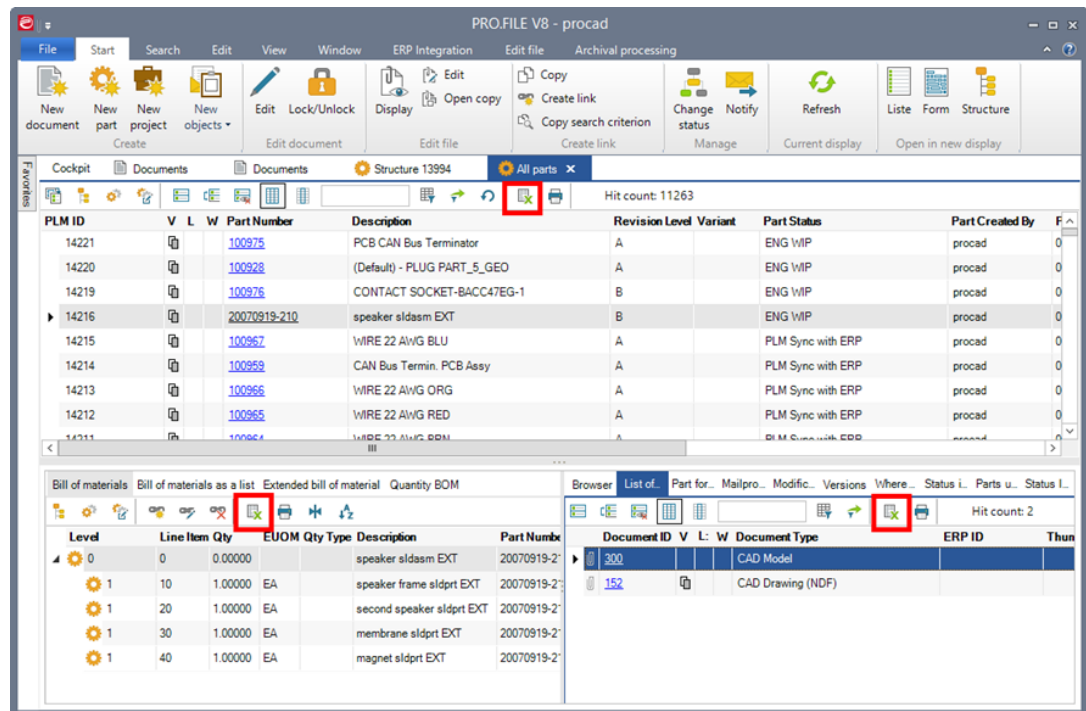
To export list or browser contents to Excel Proceed as follows

1. Activate the list or browser display that you wish to export.

2. Click on the button in the icon bar belonging to the display.

3. You are then prompted to specify a file name for the Excel table to be saved.

⇒   The data is now displayed in Excel. For better display, the column headings are displayed for each level of the exported structure in Excel separately.
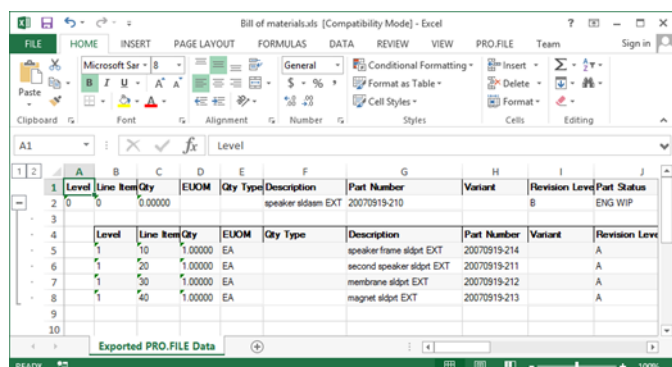
Availability: The export of browser contents is only possible for homogenous browser displays containing either only documents, only parts, or only projects.

> **Note:**
>
> The display of a non-homogenous structure from PRO.FILE in Excel is confusing, since you cannot see which entry is a part and which entry is a document. For this reason, the ExportToExcel button is not available in non-homogenous structures.

The icon "Excel export" is available in the following displays:

- Transmittals in list display
- Projects in list display
- Role assignments
- Quantity bill of materials
- Bill of materials editor
- Bill of materials as list

And in the dependent tabs

- Status log
- Modification list
- Mail log
- Versions
- Document usage
- Document structure
- Document list
- Parts list
- Role assignment
- Parts usage
- Bill of materials

3.9   Tip: Customize the Cockpit

The PRO.FILE Cockpit can be customized. There are several widgets, the contents and positions of which can be changed.

The adjustment is made via the function "Customize Cockpit" from the "Window" tab.

Function call:
"Window" => Area "**Manage**" => "**Customize Cockpit**"

Note: A matter of permissions
The customization of the PRO.FILE Cockpit requires the corresponding function access right. If the function "**Customize Cockpit**" is not displayed, you do not have this permission

After clicking on this function button, the left-hand side of PRO.FILE displays the area for customizing the Cockpit. A detailed description can be found in the following chapters.

3.9.1 Adjust Cockpit "Layout"

To adjust the layout of the PRO.FILE Cockpit, select the register tab "Windows" and then the function "Customize Cockpit".

For the layout you can now make the following settings:

1. Enter the number of lines the structure of the Cockpit is to consist of.

⇒ The lines are then listed with types and values.

2. If a line is selected in this list, the width can be adjusted. The options "absolute", "percent" and "Autosize" are available. "Absolute" is the width in pixels, "percent" is the width in relation to the total width of the Cockpit.

The following widgets can be added for the lines listed above:

- Via a selection window, elements (widgets) can be added to the Cockpit.

- Via this button, the layout can be reset to the last saved status.
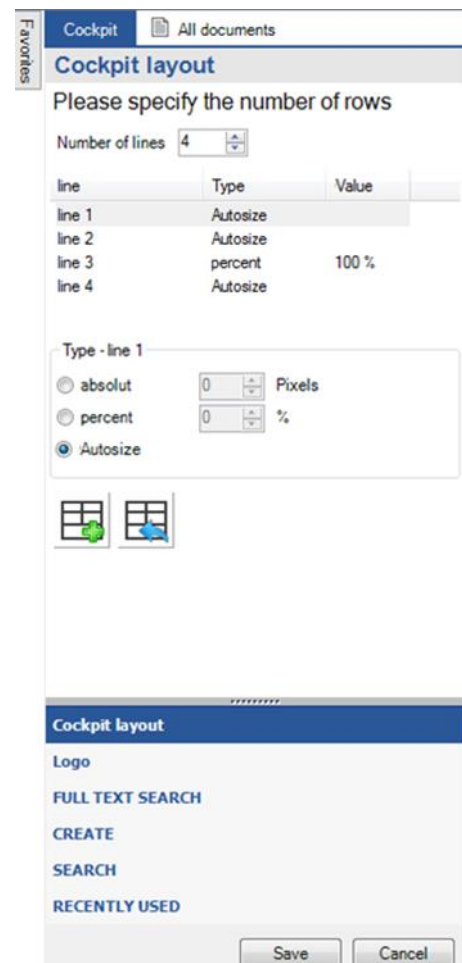
Once all settings are made, you can save the layout via the <**Save**> button.

3.9.2   Adjust Cockpit "Logo"

To adjust the logo in the PRO.FILE Cockpit, select the function "Customize Cockpit" => "Logo".

For the layout you can now make the following settings:

1. Specify the positions of the cells, in which the logo is to be displayed. Cells occupied by other widgets cannot be selected.

2. To use your own logo in the PRO.FILE Cockpit, this logo must be stored in the folder images\cockpit of the PRO.FILE configuration point. You can then enter the name of the image file in the input field.

3. Once all settings are made, you can save the layout via the <**Save**> button.
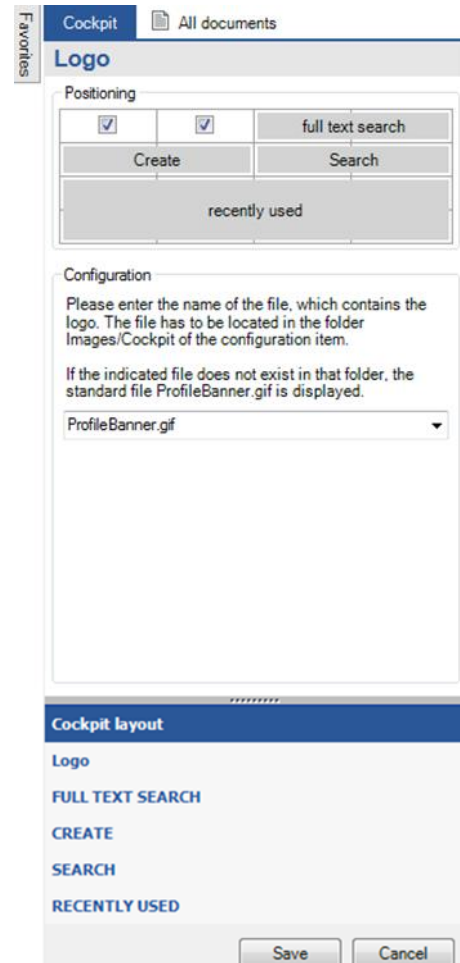
3.9.3 Adjust Cockpit "Full-text search", "Search", "Create" and "Recently used"

In the PRO.FILE Cockpit, various widgets are available in the standard:

- Full-text search

- Search

- Create

- Recently used

If these widgets are to be used in the PRO.FILE Cockpit, select the function "Customize Cockpit".

1. Select the widget to be adjusted from the bottom area of the configuration window.

⇒ The corresponding information is then displayed in the upper area. The example here shows the configuration of the widget "Full-text search".

2. You can now make the following settings:

- Specify the positions of the cells, in which the widget is to be displayed. Cells occupied by other widgets cannot be selected.

- You can also specify for which PRO.FILE objects the widget is to be available.

3. Once all settings are made, you can save the layout via the <**Save**> button.
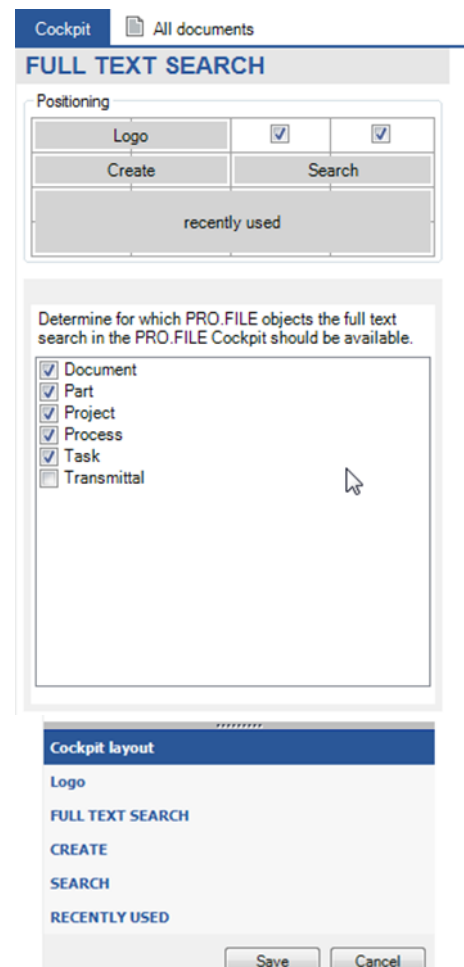
3.10 The buttons – an overview

A variety of functions in PRO.FILE can be accessed via buttons. These can be found in the toolbars of the tabs as well as in the ribbons or context menus.

The following is a list of the various buttons and their meaning:

Description	Description
Switch between single and multiple-selection mode	MarkAll (for multi-selection mode)
Insert link	Expand structure – 2 levels (for multi-selection mode)
Delete link	Expand structure – complete (for multi-selection mode)
Modify link	Show selected elements in new windows (for multi-selection mode)
Show/hide documents	Show bill of materials editor
Show/hide parts	Preview thumbnail
Show/hide projects	Preview file
Show/hide tasks	Adjust height
Show/hide processes	Adjust width
Show/hide transmittals	Fit
Create NDF job	Rotate 90° left
Print file	Rotate 90° right
Copy	Go to page …
Adjust width	Next page
Adjust sorting order	Previous page
Export list to Excel	Enlarge selection
Switch between form and list view	Enlarge
Select all rows	Make smaller
Hide selected rows	Start task
Invert selection	Finish task

Show hidden lines		Sub-processes	
Search by active column		Create new task	
Search by all columns		Create new project manager	
Filter		Remove selected project manager	
Next found pattern		Manage role assignments	
Display/hide filter		Delete selected role assignment	
New modification list entry		Previous element	
Delete modification list entry		Next element	
Edit modification list entry		Display as leading window	
Display structure bill of materials		Display in external browser	
Show part usage		Display previous page in browser	
Mark all visibile nodes(for multi-selection mode)		Display next page in browser	
Unmark all visibile nodes(for multi-selection mode)		Stop loading process	
Mark all visibile subnodes(for multi-selection mode)		Reload page	
Unmark all visibile subnodes(for multi-selection mode)			

4   The PRO.FILE register tabs

The context-sensitive menu bar makes the necessary menus available to you.
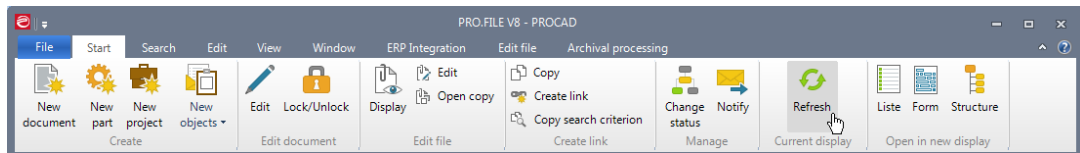
The contents of these individual menus and their appropriate commands and functions are **context-sensitive**, i.e. dynamically adjusted to the active window:

For example, when a part is selected, the tab "Edit" only shows functions that are relevant for the handling of parts. When a document is selected, the tab "Edit" only shows functions for the handling of documents.

In the following sub chapters, the functions contained in the various tabs are explained.

- [The menu "File"](#)
- [The tab "Start"](#)
- [The tab "Edit"](#)
- [The tab "Search"](#)
- [The tab "View"](#)
- [The tab "Window"](#)

An additional description is provided in the next chapter as a cross reference, for the description of the commands that are to be seen in a total relationship.

Note: Context menu via the right mouse button

A context menu is always available within the PRO.FILE interface that can be accessed through a right mouse click. This context menu largely is the same as the "Edit" menu.

4.1   The menu "File"

In the "File" menu of PRO.FILE, you can access fundamental functions and settings of PRO.FILE.

This menu contains the following functions:

- **Information:**
  Displays information on the installed PRO.FILE system. See chapter "Viewing PRO.FILE system information".

- **Deactivate project:**
  This function is also permanently available in the file menu, so that activated projects and their related data assignment for these projects can be deactivated.

- **Import document:**
  If a file has been exported from PRO.FILE for external editing, this file can be re-imported via this function. See chapter "Export / Import of documents with PRO.FILE (Option)".

- **Export Pocket:**
  This menu entry is used to export documents and parts to PRO.FILE Pocket to make their structure available offline. This optional PRO.FILE module is used e.g. for displaying objects on construction sites, where no PRO.FILE connection is available. Detailed information can be found in the manual for PRO.FILE Pocket, which you can download from the PROCAD Support portal.

- **General Reports:**
  This menu entry is used for the creation of reports (option) and is described separately in the manual "PRO.FILE Report Generator Link". This manual can be downloaded from the PROCAD Support portal.

- **Web Reports:**
  This menu entry is used for the access to Web reports. These reports are then displayed in PRO.FILE and can be used for the further evaluation of a variety of relevant data.

- **Job Monitor:**
  The Job Monitor displays the activities of the PRO.FILE Generic Job Server. Further information can be found in the manual on the Generic Job Server.

- **Default actions…:**
  This function specifies the actions to be performed when a PRO.FILE object is double-clicked. These specifications can be made individually by each user and are described in the chapter "Defining the PRO.FILE default actions".

- **Reset messages:**
  At various places in PRO.FILE, it is possible to hide frequently displayed messages. With the function "Reset messages" you can re-enable the display of all messages. All messages that have been hidden before are then displayed again.
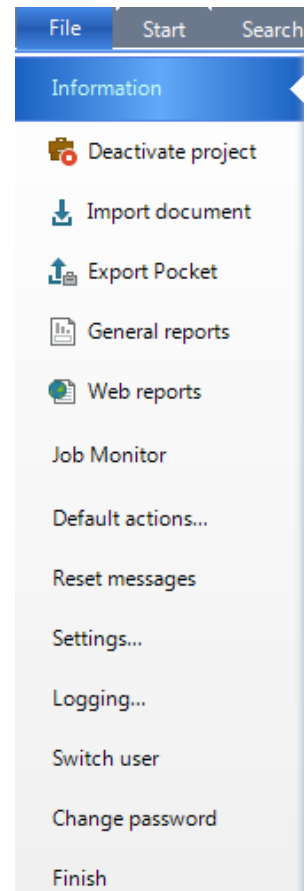
- Settings:
  Each user can make settings relating to the start and closing of PRO.FILE (see chapter "Settings for the start and shutdown of PRO.FILE").

- Logging:
  This function starts the trace configuration, via which log files of PRO.FILE system activities can be activated. This can be required, e.g. in support cases.

- Switch user:
  Each PRO.FILE user has specific function authority rights, e.g. to view certain statuses. These rights are activated when the user logs on. Various actions e.g. editing, and status changes are protocolled along with the user's name. It is therefore strongly recommended that when a user changes places to a different workstation, the in PRO.FILE registered user is changed. See also the chapter: "Change the currently logged on PRO.FILE user".

- Change Password:
  Users always have to log on to PRO.FILE with their user name and password. This is where users can change their PRO.FILE password. Please also refer to chapter "Change the PRO.FILE password".

- Finish:
  This function is used to end a PRO.FILE session, and log off.

4.1.1   Viewing PRO.FILE system information

The menu point "Information" allows you to call up the basic information from the PRO.FILE-System.

This system information is especially important for the configuration of the PRO.FILE-System. Use the entries also when you make support- enquiries, and have contact to the PROCAD hotline.

Function call:

"File" => "Information"

The following entries are then shown in the info window:

PRO.FILE V8 Release 8.6

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operating system	Microsoft Windows 8.1 Enterprise 64bit
Database Management System	SQL-Server Version 2014
Software Status	Release
Setup Build Number	00138
DBPFAD	C:\Program Files (x86)\procad\profile\
DBANWPFAD	\\PROQS2012\ConfigurationPoints\P7
Database Identifier	P7!PROQS2012
Conversion Level	8.60.0.404
Expected conversion level	8.60.0.280
Version of system data	8.60.0.404
Version of database scheme	8.60.0.0
expected Version of database scheme	8.60.0.0
Program Version	8.60.0.301
Logged-on User	PROCAD
PRO.FILE Dictionary	eng
BOM Mode	2 Position # is part of key

[To Clipboard] [Advanced]

- The operating system used.
- The database management system used.
- The software status: "Alpha", "Beta" or "Release"
- The version number of the PRO.FILE database used.
- The actual used database when working with PRO.FILE.
- The version number of the installed PRO.FILE-Version.
- The actual registered user.
- The current storage utilization of the PRO.FILE client in KB.
- The installed CAD-Integrations, that is defined in the PRO.FILE-Management Console bills of materials mode.

> **Note:**
>
> This window can also be accessed via the tray icon in the Windows system tray and via the context menu of the right mouse button.

4.1.2 Defining the PRO.FILE default actions

Via the function "Default actions" the user can specify the actions to be performed when a PRO.FILE object is double-clicked.

> **Function call::**
>
> "File" => "Default actions…"

If this function is selected, the following configuration window is displayed:
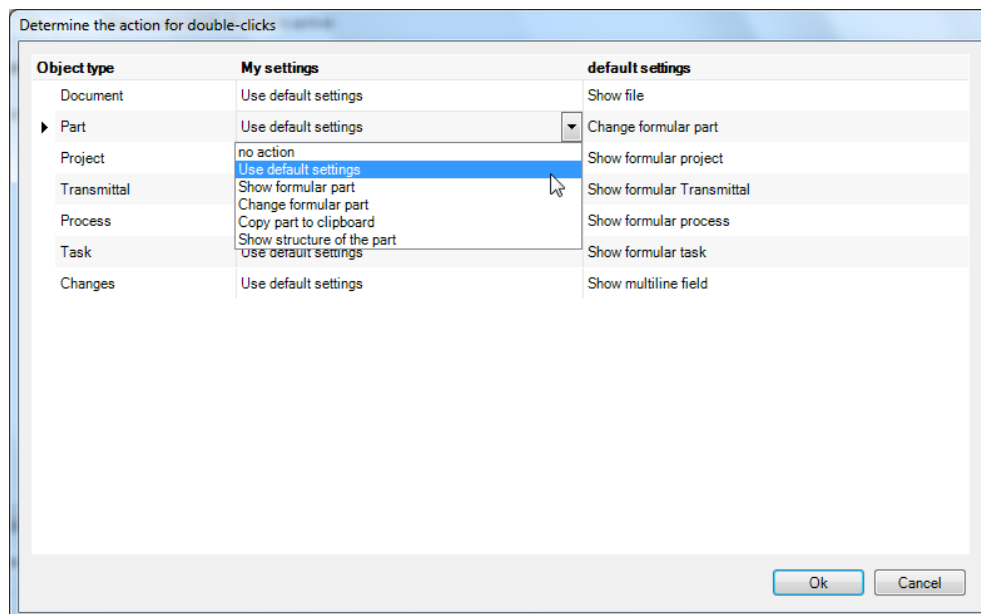
- **Object type:**
  Specifies the object type, for which the selected action is to apply.

- **My settings:**
  Here you can specify the action to be performed when the object is double-clicked. You can choose from a variety of actions as shown in the screenshot above.

- **Default settings:**
  This column shows the default settings as per installation. If the user does not specify specific actions, the action from this column is used.

Once you have made your changes, confirm with <OK> to close the window.

4.1.3 Settings for the start and shutdown of PRO.FILE

The options in the window "Settings" determine the behavior of PRO.FILE upon Windows start and closing of the PRO.FILE window.

	Function call::
	"File" => "Settings"

The four options control the following:

PRO.FILE Settings

☐ Start PRO.FILE automatically after Windows logon
☐ When closed, PRO.FILE stays active in the system tray
☐ Allow PRO.FILE and other applications to come active to the fore
☑ Show tooltips in list and browser

OK   Cancel
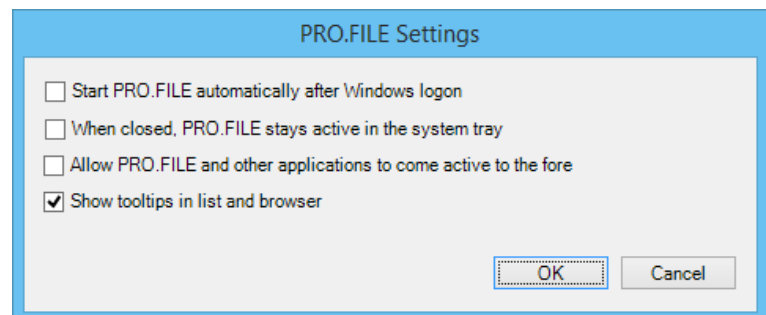
- **"Start PRO.FILE automatically after Windows logon":** When the user logs in to his Windows account, PRO.FILE is started automatically.

- **"When closed, PRO.FILE stays active in the system tray":** When PRO.FILE is closed via the ⊠ icon, PRO.FILE stays active in the system tray and allows a quick access to the program again.

	Note:
	PRO.FILE only remains active when the ⊠ icon is used. If the function "Exit" from the menu "File" is used, the program is shut down completely.

- **"Allow PRO.FILE and other applications to come active to the foreground".** This can be helpful, when an integration is used and an integration function requires action in PRO.FILE.

- **"Show tooltips in list and browser":** Tooltips in list and browser displays can be deactivated via this setting.
  When tooltips are deactivated, you can press <CTRL> + <T> to reactivate the display of tooltips for the currently active list or browser display temporarily. This activation of tooltips via keaboard only applies for the current display and is not saved.

4.1.4   Change the currently logged on PRO.FILE user

The user authorities in PRO.FILE can be set independently for each individual user. In this way, the corresponding access authorities are activated for each individual user as he/she logs on.

PRO.FILE traces all actions of the currently logged-in user, e.g. creating a document or changing a part. Part of this logged information is reflected in fields on the forms (e.g. "document created by") or the modification log.

Therefore, it is recommended when changing the user on a workstation, to also carry out a change of the registered PRO.FILE user.

You do not have restart PRO.FILE to change the user. The function "Switch user" can be used.

	Function call:
	"File" => "Switch user"

After calling up this function, the log in screen of PRO.FILE will appear.

The new user can now log in and start working with PRO.FILE.

	Note:
	Please note that when carrying out the user change, all screens and windows that are opened, will all be closed.

4.1.5   Change the PRO.FILE password

Users have to log on to PRO.FILE with their user name and password.

Users have the possibility to change their passwords. For security reasons, it is recommended to change the password on a regular basis.

In order to change your PRO.FILE password access the function "Change password" in the PRO.FILE file menu.

Function call:

"File" => "Change password"

You will now have to enter your current password, the new password and a confirmation of the new password in the mask that will appear.

Modify password

For security reasons, please type your current password first.
The new one has to be confirmed, to avoid spelling errors.

Current password
New Password
Confirm New Password

Modify   Cancel

- You have to give your current password in order to verify yourself as the user who is authorized to change the password.

- You have to confirm your new password. This is necessary because the password characters are hidden; the entries in the "Change Password" mask are indicated with "*" only. You have to repeat your entry in order to avoid possible typing errors.

- Confirm your new password by clicking the <**Modify**> button.

From this moment on, you will have to use the new password to log on to PRO.FILE.

Note:

Ask your system administrator for guidelines regarding the mandatory length and makeup of the password.

4.2   The tab "Start"

The register tab "Start" contains the most frequently used PRO.FILE functions for quick access.

The following list is to give you an overview of these functions. Detailed information can be found in the following chapters.
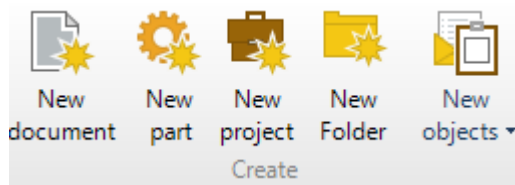
- Group **"Create"**:
  Functions for the creation of PRO.FILE objects.

- Group **"Edit"**:
  Functions for editing, locking or unlocking data records.
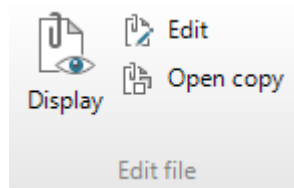
- Group "**Edit file**":
  Functions for viewing, editing or opening a copy of files attached to a document description.
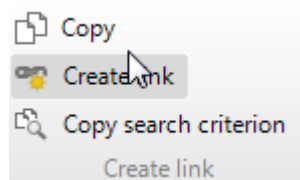
- Group "**Create link**":
  The functions "Copy" and "Create link" can be used to create structures of PRO.FILE objects. The function "Copy search criterion" is used for the creation of dynamic saved searches.
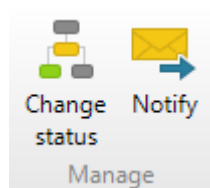
- Group "**Manage**":
  Functions for the changing of the PRO.FILE status and the sending of messages to other PRO.FILE users via the PRO.FILE Mail Connector.
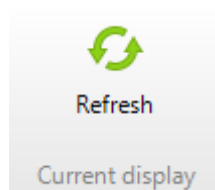
- Group "**Current display**":
  The function "Refresh" refreshes the currently displayed form, list or structure display (e.g. if data has changed in the background).
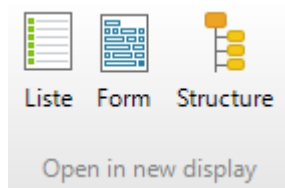
- Group "**Open in new display**":
  This function opens selected data records in a new tab as list, form or structure display.

4.3   The tab "Edit"

The tab "Edit" contains all of the commands that are required in the administration, and editing of data records. Whether a document, part, project, transmittal is active, whether a role is called up or also a structure overview, diverse commands can be found in this menu.

From "New", "Modify" and "Duplicate" to "File processing", "Lock/Unlock" and "Redlining" through to status change commands, import/export functions, and for archiving and versioning.

In this handbook, the working with PRO.FILE-objects is described in the chapters:

- Working with documents in PRO.FILE

- Working with parts in PRO.FILE

- Transmittal: digital dispatch list with PRO.FILE

For the PRO.FILE objects project, task and process, information can be found in the manual "Operation PRO.CEED Base".

4.4   The tab "Search"

It is a great advantage of PRO.FILE that the user can utilize detailed search and selection functions, so that precise information can be found and extracted from the database. To help with this you can use the PRO.FILE- "Search" tab.
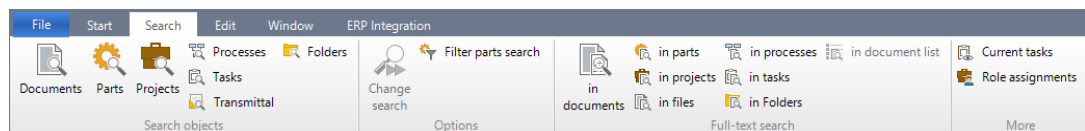
Note:

The selection possibilities for documents are controlled and protected by the user access authorities.

When a document, part or project is in a condition in which it may not be shown due to the users function access authority, it would also not be visible in the selection function.

A detailed description of the search functions can be found in the chapter "Searching and finding: selecting data records".

4.5 The tab "View"

After the selection of the data records in PRO.FILE, the information is presented in a list, or a form view.

Using the tab "View", you have the additional possibility to call up further graphic descriptions of the data.

There are special view types for all of the PRO.FILE objects. Therefore the functions that are available in the "View" tab, are always dependent on the actual called up object type, and also dependent on the present display (form or list).

The following illustrations show the "View" tab the way it appears for:

Documents in form display:
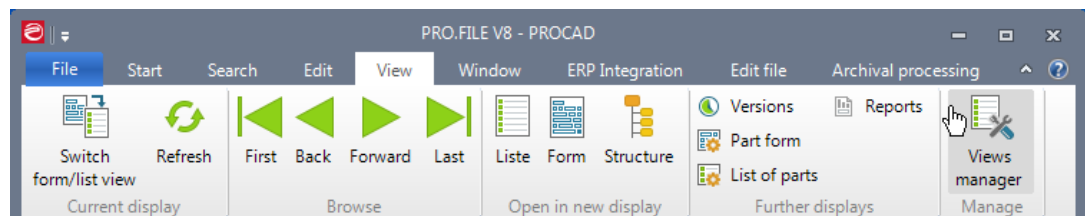
Parts in form display:
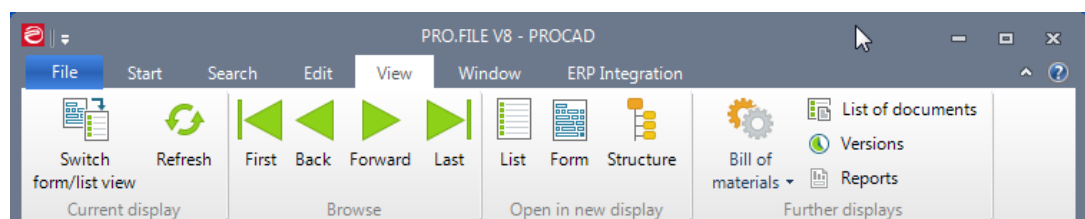
Documents in list view:
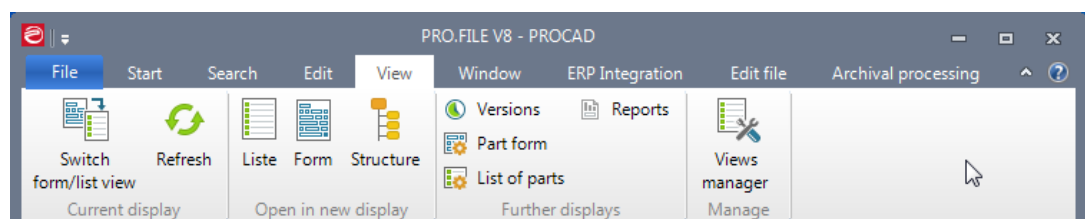
Parts in list view:
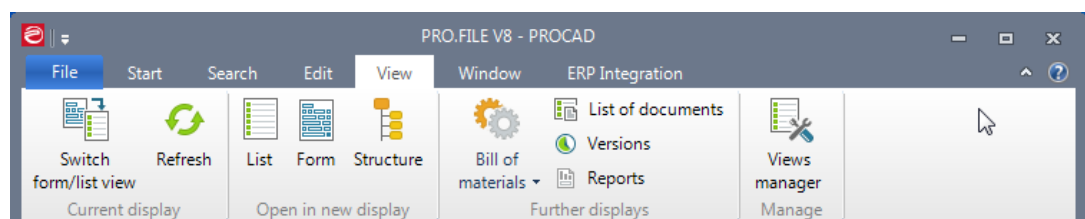
The following list gives a brief overview of the available view types and the various functions. Further information can be taken from the following sub-chapters:

Views available for all objects:

- 🔲 **"Switch Form/List view":**
  This icon allows you to switch between the form views and the list views of the currently
  accessed data records.

- 📋 **"List":**
  Presents either an object that is active in the form display as a list, or one or more highlighted objects in a new list. See also the chapter "[Working with lists](#)".

- 📑 **"Form":**
  Presents one or more highlighted objects in a form. See also the chapter "[Working with forms](#)".

- 📊 **"Structure":**
  The active document or part will be displayed in the browser view. The browser view only covers one document or part at a time. Please also refer to chapter "[Working with Browsers](#)".

Views specifically for parts:

- **"Bill of materials":**
  Enables you to call up different bill of materials view for the highlighted part. This includes the structure bill of materials, the single level bill of materials, the part usage, the structure list, with the depth and the quantity bill of materials.

- **"List of documents":**
  Shows all documents that are attached to the highlighted part, in a new list view. Further information can be found in the chapter "[Working with lists](#)".

Functions for scrolling/browsing in forms

- ▶ **"Fwd":**
  Proceeds to the next data record.

- ◀ **"Bwd":**
  Returns to the previous data record.

- ◀◀ **"First object":**
  Returns to the data record that was called up first.

- ▶▶ **"Last object":**
  Returns to the last data record that was called up.

These views are described in the following chapters.

Additional functions:

- 📋 **"Views Manager"** In PRO.FILE it is possible to create customized list views, and to save the lists produced. The administration of these list views is carried out using the view manager. The view manager is also used to publish these views for the use

of other users. Further information can be found in the chapter "Manage stored list views".

- **"Refresh"**: This menu point, or the hotkey F5 can be used to update the contents of a list or a form.

4.5.1   Display a bill of materials for a selected part

The function "Bill of materials" in the "View" menu gives you an additional submenu for the display of different characteristics or representations of bills of materials.
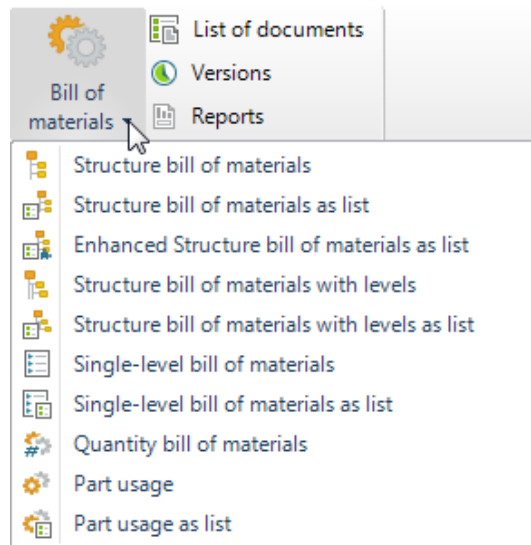
The following different Bill of materials are generally available:

Structure bill of materials

If more parts or sub-assemblies have been built into an assembly, this command will show the attached parts in a Bill of material.

The view as standard in the browser.

Single-level Bill of materials

- Only the first level of the structure bill of material is shown.
- The special list functions are available here as well so that the single-level BOM can be edited.

Quantity Bill of Materials

Via this command you can obtain a list which shows which parts in what quantities are built into a specific assembly.

The special list functions are also available here for the further editing of the quantity BOM.

Parts usage

This command creates a browser that shows in which assemblies the selected part was used. If the selected part is an assembly of the highest level the browser will remain empty.

The specific list functions are also available here for further processing of the part usage list.

4.5.2   Updating lists and forms

By the Hotkey F5 or menu option "View" => "Refresh" contents in lists, forms or browsers can be updated. Data which are modified or expanded in the meantime will be updated and shown in the latest state in forms or lists.

> **Note:**
>
> Updating of lists, forms and browsers is not available for all windows. If a window does not react to the command, a corresponding message is displayed.

4.6   The tab "Window"

The PRO.FILE "Window" tab contains commands that are used to close individual or inactive or all tabs in the PRO.FILE user interface.

If the mouse pointer is placed on the header of a list or form tab, these functions are also accessible from the context menu of the right mouse button.

The following functions are available in the "Window" tab:
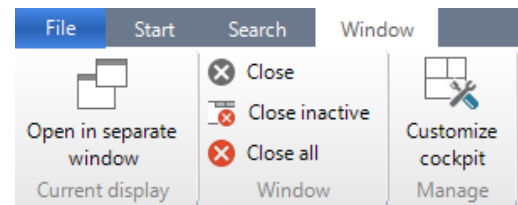
- **"Show in separate window":**
  If this function is called, the currently active tab will be displayed in a new, separate window. This allows you to open multiple PRO.FILE windows next to one another. Please also refer to chapter: "Display tabs in a separate window".

- **"Close":**
  Windows standard: closes the last active tab within the PRO.FILE user interface. (And not the last tab that was last open.)

- **"Close inactive":** Closes all tabs of the PRO.FILE user interface except for the currently active one.

- **"Close all":**
  Closes all tabs that were opened by the users so that only the PRO.FILE initial screen will be shown.

- **"Customize cockpit":**
  As user can customized the information and widgets in the PRO.FILE Cockpit. See chapter "Tip: Customize the Cockpit".

Note:

The currently active tab is always highlighted:
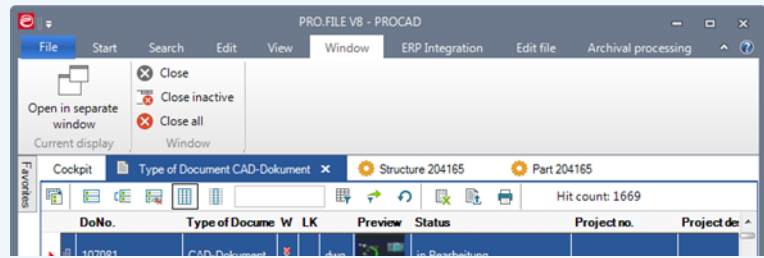
4.6.1   Display tabs in a separate window

Tab windows that are displayed within the PRO.FILE user interface can be opened as a separate independent window.

A new window will be opened in addition to the PRO.FILE interface in which the selected tab will be displayed.

By doing so you can also display multiple PRO.FILE list or form views in separate windows next to one another. This is beneficial for a repeated selection of "Copy" and "Link" for different data records.

You can "pin" such a window in order to permanently place it in the foreground. Please refer to chapter "Pin separate windows of tab views to the foreground?" for more information.
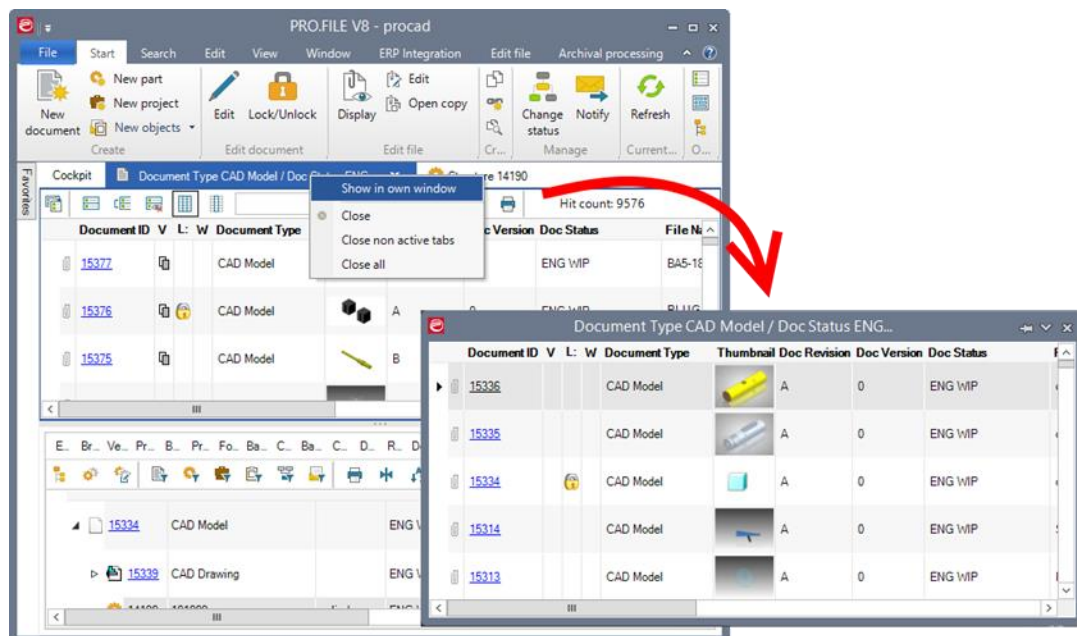
	Function call:
	"Window" => "Show in own window"

Proceed as follows

1. Activate the tab that you want to display in a separate window. The currently active tab is always highlighted.

2. Access the PRO.FILE "Window" menu and select the command "Show in own window".

3. The activated tab will be opened in a separate window, as illustrated above. Now, it is no longer available within the tabs of the PRO.FILE user interface but only in this separate window.

	Note:
	Of course, the list function as described in chapter "Working with lists" is also available to you in these "separate windows".
	In these separate windows, the edit menu can be accessed from the context menu of the ⟨ right button!

Bringing the separate window back to the PRO.FILE user interface

In order to bring a tab that is opened in a separate window back to the PRO.FILE user interface please click the ∨ icon in the header of the separate window.
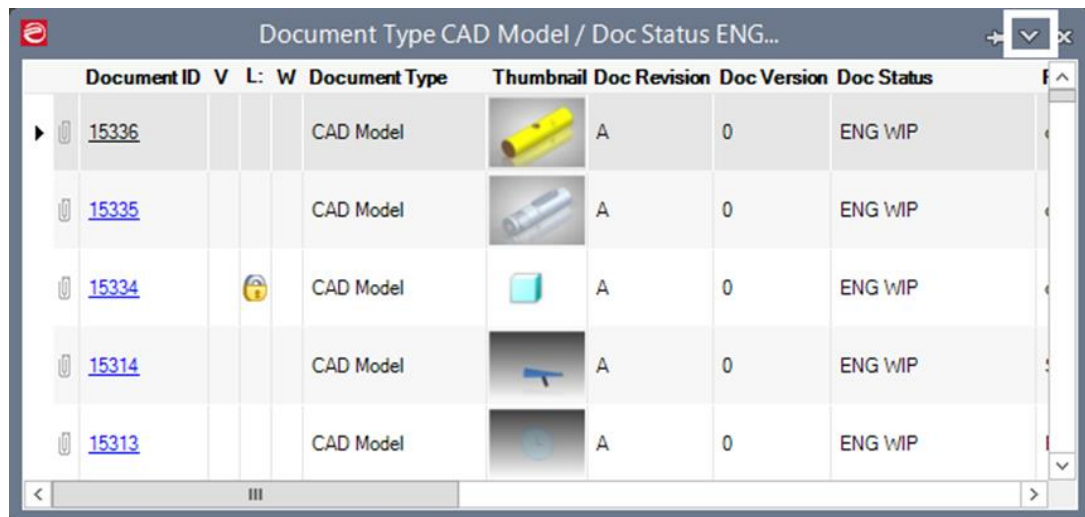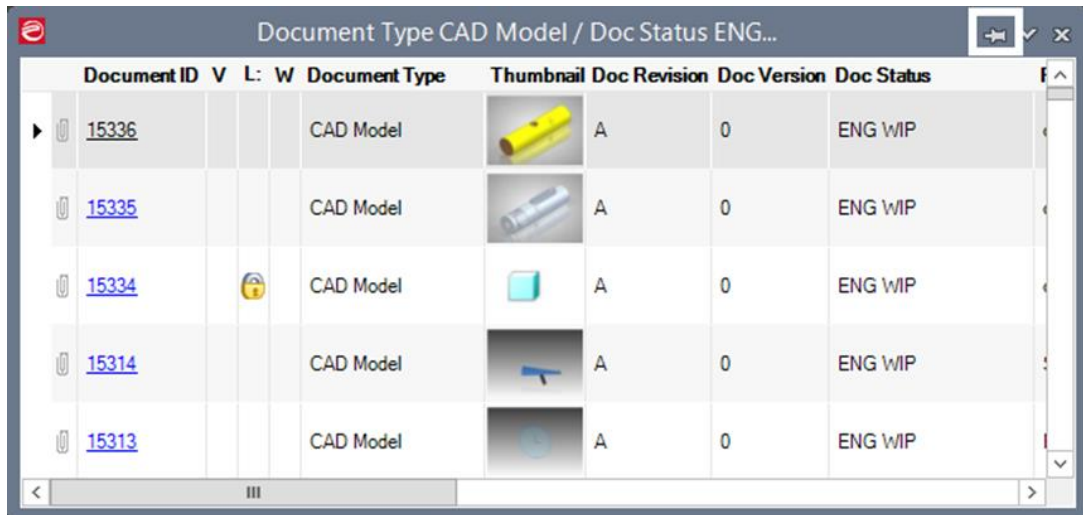
Pin separate windows of tab views to the foreground?

If PRO.FILE tabs are opened in separate windows then these will act according to the Windows standard: if you click on the general PRO.FILE user interface again the separate windows will disappear to the background.

However, the user can choose to permanently keep separate windows in the foreground of the general PRO.FILE window.

In order to do this, use the ⊞ icon on the right hand side of the window header.

The pin icons have the following meaning:

- : The separate window is not permanently pinned to the foreground. This can be changed by clicking this symbol.

- : The separate window is permanently pinned to the foreground. This can be changed by clicking this symbol.

4.7   The PROOM tab

PROOM is a solution for the document exchange in technical companies. For PROOM users, PRO.FILE offers a specific menu for the data exchange between PRO.FILE and PROOM.

Detailed information can be found in the chapter "Optional: The PROOM Integration in PRO.FILE".

Licenses required for PROOM

In order to use the PROOM integration in PRO.FILE you need a PROOM Enterprise license.

4.8   How do I access the PRO.FILE online help?

To support you in your work with PRO.FILE, you can access a help in NetHelp format.

Function call:

The help can can be accessed via the corresponding icon in the top right corner of PRO.FILE or via the "**F1**" key.
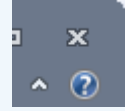
When the function "PRO.FILE help" is selected, the PRO.FILE help is displayed in your web browser.

- The left-hand structure contains the overview of all chapters, which you can select.
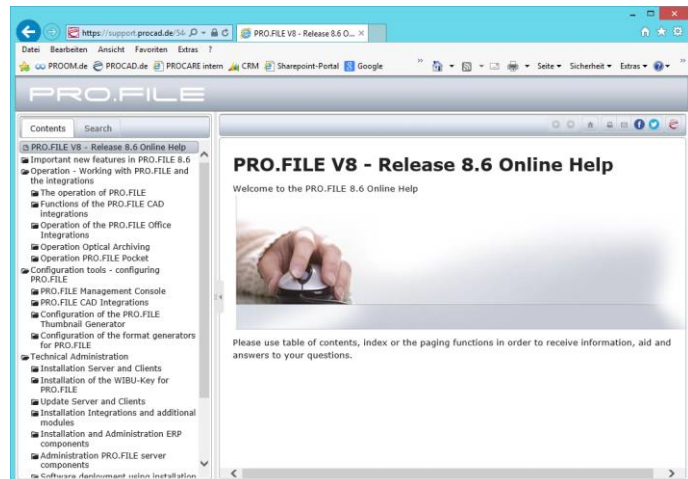
- The information for the selected chapter is displayed in the right-hand window.

Within the help window you can use the following functions:

:   Switching back and forth between help chapters

Contents: Display of the chapter structure

Full-text search   Enter a search string. The entire help is searched for this string. Resulst are displayed in the left-hand bar.

:   Print the currently displayed help chapter

> **Note: Help access "locally" or via the internet**
>
> The PRO.FILE help is either locally installed on your computer or company network – or is accessed via internet connection from the server of the company PROCAD. The second option has the advantage that the help is always up to date.
>
> You can see in the address bar of your web browser whether the help is accessed locally or via internet. Additional information for administrators can be found in the manual "Installation and administration PRO.FILE Online Help".

4.9   Tip: Quick access to functions via the Quick Access Toolbar

PRO.FILE has a quick access toolbar at the top left corner of the window.

This toolbar allows for customized quick access to PRO.FILE functions.

In accordance with Windows standard, you can deposit the functions most relevant to you in this toolbar.

The contents of this quick access toolbar are displayed in dependence of the selected PRO.FILE objects: Depending on whether a document, part or project, etc. is selected, the available icon buttons are displayed or hidden.
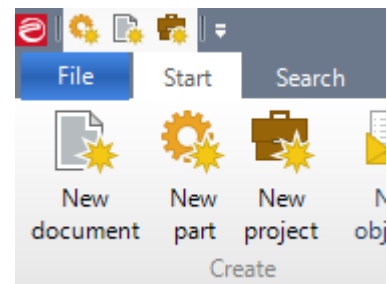
5   Searching and finding: selecting data records

One basic activity when working with PRO.FILE is the search for existing data records. The search can be performed using four basic search types:

- **Possibility 1: search with the search form**
  When searching using the search form, users can individually configure every single search. Please also refer to chapter "Searches using the search form".

- **Possibility 2: full-text search:**
  Full-text search allows users to search for keywords or strings that can be found either in the object description or even in the attached files (of document descriptions) on the file server.

  See chapter "For data and files: the "Full-text search"".
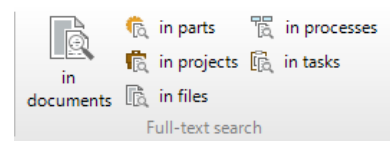
- **Possibility 3: the Favorites and subscriptions:**
  Favorites deliver a list of results with one click of the mouse and are therefore a fast search option. The favorites are defined by the user according to the user's specific requirements. Subscriptions are used to indicate changes to the objects that are found by the favorites. See chapter "Saved searches and subscriptions".
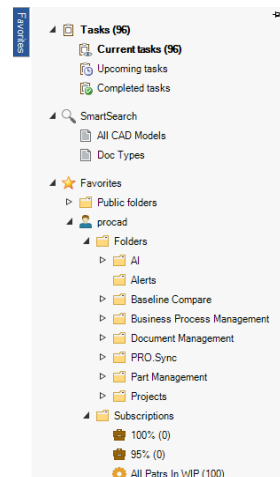
- **Possibility 4: the SmartSearch:**
  A SmartSearch is a search form that only features the desired number of fields which drastically reduces complexity. A SmartSearch will only contain those fields that the user needs for a specific search. Please refer to chapter "SmartSearch".

For detailed information on the utilization as well as on the possibilities of search form, full-text search, Favorites and SmartSearch please refer to the following chapters.

5.1   Searches using the search form

If you want to search PRO.FILE for specific data you can choose between different possibilities that can be accessed through the "Search" menu.
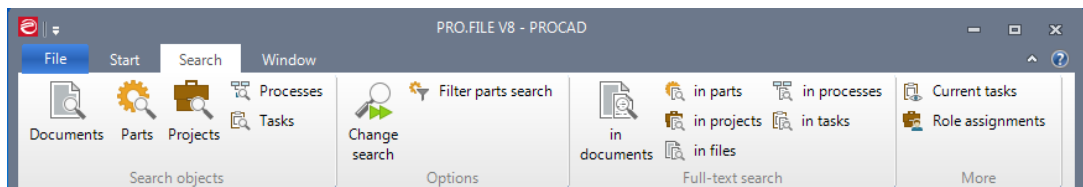
This menu offers various options for a detailed search and access to PRO.FILE objects to be displayed.

During the search you can specify whether the search results are to be displayed in form or list display.

Note:

The selection possibilities for documents are controlled and protected by the user access authorities.

When a document, part, project or transmittal finds itself in a condition in which it may not be shown due to the users function access authority, it would also not be visible in the selection function

Function call:

"Search" => Group "Search Objects" => "…"

This input form and the resulting procedures are different for the search for parts and documents. Detailed information can be found in the sub-chapters "Search for specific types of documents" and "Search for specific part characteristics"

1. An input form is displayed (search form), in which you can entert he search criteria. Depending on the configuration, you can also use selection functions and reference lists.

2. Search results in list or form display:

    In the search form you can use the options at the bottom of the window to decide whether you want to display the search results in list or form view:

-   There is also the option Documents-parts list:
    This search function enables the selection of documents that are used with part characteristics in the selection screen of documents and CAD data.
    Using this function allows you to use information from the part master records for the selection of data as well as those of the document master record.
    This simplifies relocating documents and CAD drawings that you know belong to specific parts. If, for example, in the selection screen for documents the characteristic "**Part number**" is used, the results list will contain a list of the search criteria that refer to a specific part that is in the document. More information is available to you in chapter
    "Usage of part characteristics in the selection mask of documents and CAD-data".

3. Search in versions?

-   Via the option "Also search in versions at the bottom of the search form you can enhance the search to also include versions of the document (or part – provided that part versions are activated in PRO.FILE).

4. Specific search options for categories

    You can also include categories in the search by activating the corresponding fields within the specified category field. The search will then include the selected categories as AND criteria, i.e. the search will find records that are assigned to at least one of the selected categories.

Right click on the field and select from the following options in the context menu:

- **Has categories**: Searches all objects that have been assigned categories.

- **Does not have categories**: Searches all object that have not been assigned categrories.

- **Purge field**: Removes the current setting from the field.

5. Do you want to combine the search fields with a full-text search?

- Via the button <**Next**> you can combine your search form with a full-text search. The input for the full-text search is connected tot he input for the search form by an "AND"-connection. For more information see "[For data and files: the "Full-text search"](#)".

6. After the input of your search strings, the search is started by clicking on the button <**Search**>.

⟹ The result of the search is displayed.

Note:

You can use the search form or the full-text search or both. Both options can be used separately.

Note:

The search step for the full-text search is only displayed the full-text search is configured for the database.

Note:

You can also use wildcards such as "*" as described in chapter "[Note: Optimize your search by using wildcards](#)".

This search form and the resulting procedure differs for the search for documents and for the search for parts.

Please refer to the following subchapters:

- [Search for specific types of documents](#)

- [Search for specific part characteristics](#)

Unsuccessful search

If no data record matches the search, the following information dialog box will be displayed:
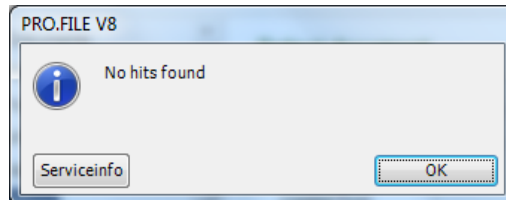
Then a new selection form is displayed and new search criteria can be typed in.

Successful search

If a data record matches the search pattern,

- the search resalts are displayed in list form or

- the first of the found data records found is displayed in an output form.

The icon causes PRO.FLE to switch between form display and list display.

Very general search criteria lead to the output of data records. The list commands make it quick and easy to reduce this output.

Here the work can be done in various stages i.e. a list can be shortened, narrowing down the listed data records through more specific search criteria.

By clicking on the icon , the selection form is displayed showing the previously entered search criteria. Additional criteria can be specified. (= Search repeat with search pattern retained / expanded.)

When calling up this function, the previous search values are taken on in the new search field, they can then be either accepted as they are, or edited, shortened or lengthened.

5.1.1 Search for specific types of documents

If the search for documents is opened using the function **"Search" => "Documents"** the search form for documents will be displayed.

This facilitates the selection of the document types.

> **Note:**
>
> A document description in PRO.FILE always consists of two parts: the fixed document description and the variable document description. The fixed document description is identical for all documents in the database. The variable document description varies depending on the type of document that is selected.
> This allows users to capture different types of information for the document type "CAD" document and for the document type "Template", for example.

You can find a list of the document types that are configured within your database in the left column of the search form. Simply click one of these list entries to select the desired document type. This can also be done using the drop down menu of the search form field "Type of document".

Depending on your selection the search form will now show the corresponding variable document characteristics. These can now be used for the search as well:

5.1.2   Search for specific part characteristics

If the search for parts is opened using the function "Selection" => "Parts" the search form for parts will be displayed.

The list on the left hand side of the search form allows you to select specific characteristic for the search.

Note:

Different types of part information can be included in PRO.FILE depending on the level and depth of the key characteristics list.

If a characteristic is selected the search form will automatically feature the corresponding search fields:

| 5.1.3 | Narrow down a search result |

When the search via the search form is completed you will receive the data records that correspond to the search criteria, either in a list view or in a form view.

In order to further narrow down these results and to fine-tune the search with additional criteria you can now use the "Change search" function:
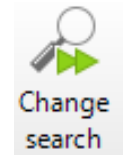
Function call::

Tab "**Search**" => "**Change search**"

- Clicking this icon will reopen the selection made for the active window. This search mask will then already include the previous search criteria. These values do not have to be entered again but can be fine-tuned and narrowed down.

- Once the search is started these new search criteria will now be used for the data records that are already displayed in the active window.

The selection in the active tab thus does not refer to the entire contents of the database but only to the contents of the active tab. You can find no new data records by expanding the criteria. It is only possible to further narrow down those you have already found.

| 5.1.4 | Narrow down the search for parts using the selection filter |

The function **Filter parts search** that is located in the "Options" in the "Search" menu enables the pre-settings that are to be permanently used for a search, with additional search criteria, to be set. This can be of great advantage when searching for parts with specific CAD documents.

Function call:

"**Search**" => "**Options**" => "**Filter parts search**"

After the function has been called up, a selection screen appears, in which you can set all of the required selection filters.
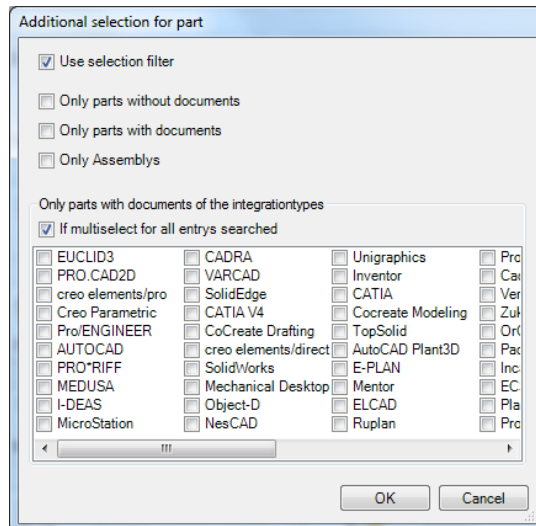
To do this you will find a list of different search criteria that can be activated by checking the respective checkbox. The checkboxes are activated with the mouse pointer.

The following criteria are available through the selection filter:

- **Only parts without documents:**
  This search will only find those parts that have no links to any documents.

- **Only parts with documents:**
  This search will only find those parts that have at least one link to a document.

- **Only Assemblies:**
  This search will only find those parts that are part of an assembly and therefore have links to other parts.

- **Only parts with documents of the integration types:**
  If the filter setting "Only parts with documents" is activated then you can use this area to additionally select which documents of which integration should be taken into account. The desired integration types are activated by checking the respective checkbox.

If multiple integration types were selected then the parts will have to be connected to all of the selected document types in order to be found by the search. Example: If the integration types "AutoCAD" and "MS Word" were selected the search will only find parts that are linked to the document master data of an AutoCAD document as well as to the document master data of a Word file.

Note:

(This option can only be selected if the selection "Only parts with documents" was activated beforehand).

Using this screen, it is possible through the application of "**Use selection filter**", to determine whether the set search filter is to be used during the next selection of PRO.FILE objects or not.

- If the selection field is set to "**Yes**", the selection filter will be considered by every new search that is carried out. Therefore, only data records that fulfil the selection filter criteria will be found.

- If the selection field is set to "**No**", the selection filter criteria will not be considered during a search.

5.1.5   Usage of part characteristics in the selection mask of documents and CAD-data

With "Search" -> "Documents-parts list" you can use the characteristics of the part data in addition to the document data characteristics.

The finding of documents an CAD-documents relating to relevant parts is easier. For example, if you use the characteristic "Part number" in the selection mask, the results list of the search will only contain documents relating to the relevant part.

5.2   For data and files: the "Full-text search"

Via the function "Full-text search in …", it is possible to search the part and document descriptions

The full-text search allows users to search for keywords or strings that can be found either in the document or part description or even in the attached files on the file server.

	Note:
	The full-text search must be configured in the PRO.FILE Management Console, otherwise, an error message is displayed.

The full-text search can always be accessed from two points within PRO.FILE:

- from the PRO.FILE **Cockpit:**
  Please refer to chapter "<u>Start the full-text search from the PRO.FILE Cockpit</u>".

FULL TEXT SEARCH

- and from the "**Search**" tab in the PRO.FILE ribbon bar:
Here the user is given separate access to the full-text search for parts and for documents; the search for documents comprises further settings in order to include the attached file. For a detailed description please refer to chapter "Start the full-text search from the "Search" tab".
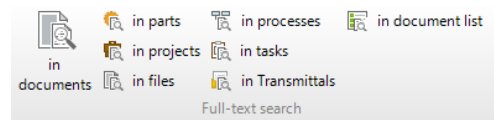
5.2.1 Start the full-text search from the "Search" tab

The full-text search in the PRO.FILE "Selection" menu gives users an additional search mask in which the conditions for the text search can be determined. The search mask for the search for documents differs from that for the search for parts.

Function call:

"Selection" => "Full-text search in documents"
"Selection" => "Full-text search in …"

Full-text search in parts, projects, processes, tasks and transmittals:

After calling this function the following entry window will appear:

Enter the desired search text. You can use letters, numbers, characters and links.
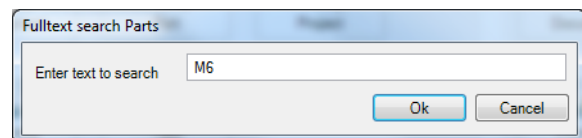
Please also refer to chapter "Tips on using the search function "full-text search"".

Confirm your entry by pressing the <OK> button.

⇒ PRO.FILE will now search the parts descriptions of the parts that are accessible to you in the database for the search text and provide a list of all search hits.

Full-text search in documents

After calling this function, an entry window will appear that leaves room for differentiated specifications regarding the full-text search:
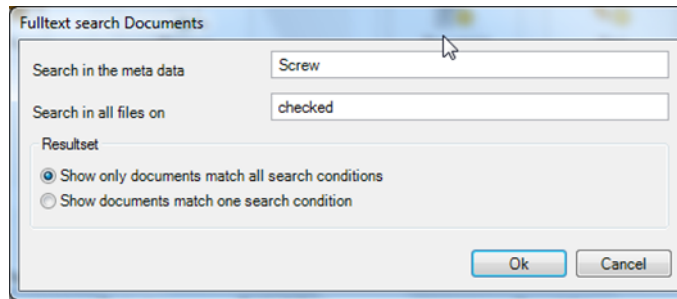
The search text can contain letters, numbers, characters and links (also explained in chapter: "Tips on using the search function "full-text search""). This search window offers different fields, one for the search in the document description and one for the search in the file that is attached to the document description:

- **Search in the meta data**: The search term that is entered here refers to the document description, the meta data of the data record. The document descriptions of the document data records that are accessible to you will be searched for this search term.

- **Search in all files on**: This is where the search term for the search within the physical files (e.g. a Word document or an AutoCAD document) is entered. All files accessible to you in the database that are attached to the document descriptions in PRO.FILE and that are saved via these document descriptions in PRO.FILE will be searched for the entered search term.

The third setting lets you determine how the two search terms are to be used:

- **Result set:**

    - Show only documents that match all search criteria: In order for a document to be included in the list of results, the search term for the document description has to be found **as well as** the search term for the attached file. Both search terms have to be found in order for the data record to be included in the results.

    - Show documents that match at least one search criterion: In order for a document to be included in the list of results **either** the search term for the document description or the search term for the attached file has to be found. The list of results will include all documents for which the meta data search term was found in the document description and, additionally, all documents for which the file search term was found in the attached file.

Confirm your selection by pressing <OK>.

The documents found for your search criteria will be displayed in a list.

Full-text search in document lists

Via the function "**Full-text search in Document list**", a search via all files of documents in the current document list is started.

After calling this function the input mask for your search term is displayed:
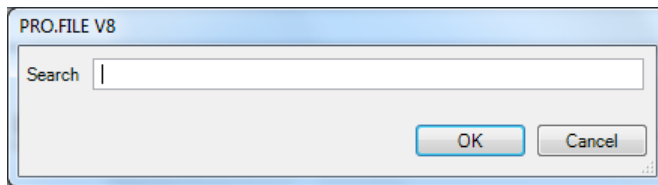
This is to make a pre-selection of files to be searched.

Full-text search in files

After calling this function the input mask for your search term is displayed:
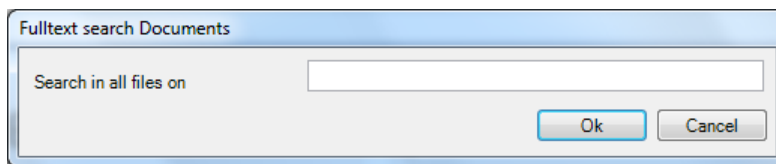
Via the function "**Full-text search in files**", a search via all files of documents accessible by the user is started.

The search does not distinguish uppercase and lowercase spelling.

The results of a search are displayed in a separate tab in list form.

Settings:

For the full-text search in metadata, the tables DOKSTAMM, DOKVAR, DOKVAR1, DOKVAR2, MLFIELD and DOKTYP are scanned. The full-text catalogue must be filled with these tables.

5.2.2   Start the full-text search from the PRO.FILE Cockpit

You can perform a full-text search from the PRO.FILE Cockpit directly after starting PRO.FILE. The Cockpit will always remain accessible to you via the tab in the PRO.FILE user interface.

The full-text search from the Cockpit is realized using a single entry field:

- Enter the term you are searching for into the "full-text search" field. You can use letters, numbers, characters and links. Please also refer to chapter: "Tips on using the search function "full-text search"".

Use the icon on the right hand side of the entry field to determine whether you are searching for documents or parts:
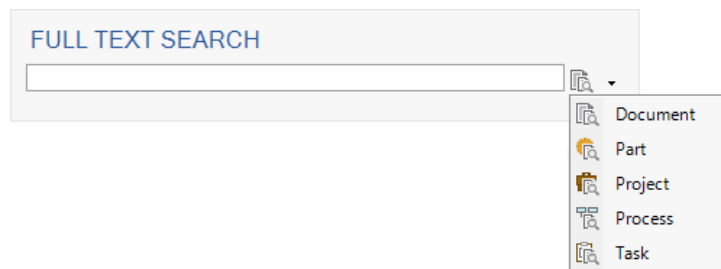
The corresponding icon will then either start the search for documents or for parts:

- Parts:
  The parts descriptions available to you in the database will be searched for the search term. If the search term corresponds to information that is stored within a parts description then these parts descriptions will be included in the list of results.

- Documents:
  The document description (meta data) as well as the contents of an attached file will be searched for the search term. All documents that are available to you in the database will be included in the search. The list of results will display all documents that either contains the search term in the document description or in the attached file.

- Projects, processes, tasks, transmittals:
  Here, too, the entered search string is looked up in the database. If the search string is found in one of the records for the selected object type, the results are displayed in a list.

Attention:

Please make sure that you perform the right type of search (documents/parts/projects/processes/tasks/transmittals) or you will not be able to obtain the desired results.

5.2.3 Tips on using the search function "full-text search"

In the selection function "Full-text search in documents/parts ", it is possible to "play" different Wildcards and operators, to search for data as precisely as possible

These possibilities are listed below and relate to the entry field ‚Search in Metadata for' as well as the entry field ‚Search in files for', unless an alternative is specifically mentioned.

Simple search for a word or word order:

If you are searching for a particular word, this word should be entered into the entry field. The word can also be entered inquotation marks. If you are searching for a specific word order, it is important to note that the exact word order to be found, must be entered into the entry field in quotation marks.

Working with logical operators:

Different search criteria can be linked together. The following operations are available for this:

OR

AND

NOT

Examples:

Example 1: Mountain OR Hill

Either mountain or hill must be present in the searched data.

Example 2: Mountain AND Hill

In this search, both mountain and hill must be present. When searching metadata, mountain and hill must be present in a field.

Example 3: Mountain AND NOT Hill

When searching files, mountain must be present in the files, whereas hill must not be present. When searching in metadata, mountain must appear a field, but hill must not be present.

Example 4: "John Smith" OR Hill

In this search, the word order "John Smith" or hill must be present.

If several words are entered, and there is no logical operator in the entry field, and the words have not been entered in quotation marks, the word AND will be placed automatically between the words. This means that if you run a search to find documents containing the word mountain as well as the word hill, you could use example 2, and it too could have AND left out.

> **Attention:**
>
> In a full text search in the metadata, the command AND means that both terms must be present in a field. It is not possible to carry out a search in which the "AND" relates to several fields.

Working with Wildcards/variable characters:

In contrast to the other PRO.FILE selection functions, when applying the selection function "Full text search in." as a Wildcard/Variable character, only the character "*" is allowed.

"*" Stands for "random".

5.3   Note: Optimize your search by using wildcards

For entering criteria the following wildcards are possible:

`*`	replaces several symbols
`?`	replaces one symbol
`<`	smaller than
`>`	greater than
`<=`	smaller or equal (only for float fields)
`>=`	greater or equal (only for float fields)
`-`	from - to (Range Selection)
`!`	Exclusion of the follow-up text
`||`	"Or"- connection of two expressions
`!*`	Search for empty fields
`??*`	Search for not-empty fields
[*]	To search for percentages, the %-character has to be replaced by this wildcard. Example: A search for "50% discount" should look like this: *50*[*]*

Additional information on wildcards:

- By entering "!" at the start of a search text, makes the search carry out a search, and show all results except those containing the text that follows the exclamation mark. (E.g. by entering "!Text1" all descriptions will be shown except those containing "Text1").

- The entering of "||" into the search text, separates two phrases, and presents them as an OR-link, (e.g. the entry "Text1||Text2", shows all entries containing "Text1" or "Text2").

- It is also possible to search using the date function. See also the chapter "[Search using relative dates]()".

5.4   Search using relative dates

When searching for PRO.FILE-objects, different date functions can also be set. In this way, it is possible to enter a sure date, a relative date, or a date range.

In the date fields, using the button ![button], it is possible to call up the date selection function, the following entries are included:

Yesterday (#-1)

Today #

Tomorrow (#+1)

This week (#w)

This month (#m)

This year (#y)

Last week (#w-1)

Last month (#m-1)

Last year (#y-1)

Next week (#w+1)

Next month (#m+1)

Next year (#y+1)

Until yesterday <=(#-1)

Until today <=#

Until tomorrow <=(#+1)

Since yesterday >=(#-1)

Since today >=#

Since tomorrow <=(#+1)

The user can also set the possible date entries. The following possibilities are available for this:

- [Search for a point in time with a simple date expression](#)
- [Search for a point in time using relative date expressions](#)
- [Search for a period in time by entering a relative date range](#)
- [Search using a period of time by linking fixed and relative date expressions](#)
- [Search using date comparison expressions](#)

Warning:

When applying the date functions, no difference is made between work days and public holidays.

Note:

It is also assumed that the operating system showed no problems with the year 2000.

The projects parts and documents that have been searched for must have values that are after 31.12.1899 in the date fields.

Search for a point in time with a simple date expression

A simple date expression can be entered in the following way:

Today

#d   Today

"Date"   Exact date, e.g. 29.05.2003

Example:

If the date criteria #d, is entered in the field "Reminder" of the favorite, the object with the date that matches exactly that of the date entry in the field "Reminder" of the favorite will be shown.

In brief: If I call up the favorite on 12.4.2003, all objects with the reminder date 12.4.2003 will be displayed. If I call up the favorite two days later, we would write 14.4.2003 and the favorite would display all the objects with the reminder date 14.4.2003.

The same applies of course for e.g. Changes- and new created dates.

Search for a point in time using relative date expressions

When searching with relative date expression, you can enter a point in time that is related to a certain period of time from today's date.

The search with relative date expressions, are based therefore on relative time entries "Today".

"Today" is entered as "#", "#d".

In addition to this relative date, the period of time is then added, or taken away.

The terms "d" for day, "w" for week, "m" for month, and "y" for year are used for this.

The way to write it is as follows ("|" is to be read as "or"):

(# +|-number d|w|m|y) or

(#d +|-number d|w|m|y)

Example:
#, #d Today
(#+5d)   Five days from today
(#+1m)   A month from today
(#-1y) A year ago today

Search for a period in time by entering a relative date range

When searching for a PRO.FILE-object, a relative date range can also be entered, which can provide information for a period of time in relation to today. The following terms are available for the entry of a relative date range:

- #d Today
- #w This week
- #m This month
- #y This year

Note:
The date range is always calculated in the given period of time from 0:00 to 23:59.

These expressions can also be adapted. This can be done by using ("|" is to be read as "or"):

- (#d +|-number)
- (#w +|-number)
- (#d +|-number)
- (#d +|-number)

"+|" Number always represents the amount of time in the future or past in which the search should be carried out.

#y-5)   In the year 5 years ago
(#m-1)   Last month
(#d+1)   During tomorrow

Search using a period of time by linking fixed and relative date expressions

When searching for PRO.FILE-objects, many possibilities are available to link sure date entries and relative date entries, to carry out a search in a specific period of time.

The following links are possible ("|" is to be read as "or"):

- Entering the period of time using a sure date entry:

    - "Date" – "Date", e.g. 21.6.2002–5.4.2004

- Entering the period of time using a sure- and a relative date entry:

    - "Date" – (# +|-Number d|w|m|y)
      e.g. 01.01.2003–(#-1d): From 1.1.2003 to yesterday.

    - (# +|-Number d|w|m|y) – "Date"
      e.g. (#-1m)-31.12.2003: From a month ago today to 31.12.2003

- Entering the period of time using two relative time ranges:

    - (# +|-Number d|w|m|y)- (# +|-Number d|w|m|y)
      e.g. (#-1y)-(#-1d): A year ago today to yesterday.

Note:

The search over a period of time is only possible using the link of relative entries, not using the relative entries of a time range.

Search using date comparison expressions

When searching for objects, it is also possible to apply a simple comparison operation. The following possibilities can be used for this:

>   After

<   Before

>=   Then or after

< =   Then or before

Example:

< 1.11.2003	search all objects that were created before 1.11.2003.
< #d	All objects that were created before today.
>=#w	All objects that were created after this week.

Examples for searches with date entries

The following examples help to explain the concept of the date search in PRO.FILE:

#	Search all objects that were created today.
<(#-1)	Search all objects that were created up until the day before yesterday.

#w	Search all objects that were created this week.
(#m-1)	Search all objects that were created last month.
1.1.03-(#-1)	Search all objects that were created between the 1.1.2003 and yesterday.
<1.11.02	Search all objects that were created before the start of the 1.11.2002.
(#+1d)- (#+1m)	Search from tomorrow to a month from today.

Example only for the new creation, or the editing of master records:

(#+2)	Carry as reminder for the day after tomorrow.

6   Functions of the favorites bar

Via the favorites bar at the left-hand side of the PRO.FILE Windows Client GUI, you get access to various advanced search and quick access functions.

These are described in the following sub-chapters:

- [SmartSearch: Create your own form](#)

- [Saved searches and subscriptions](#)

- [Working with folders](#)
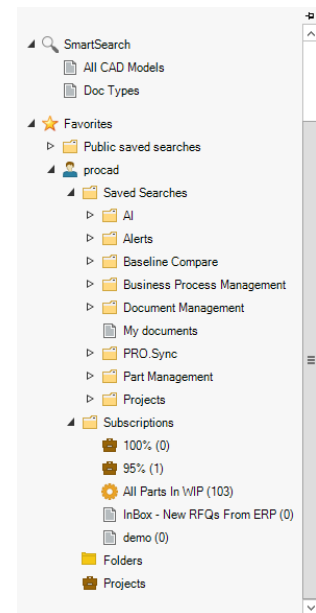
The display of the favorites bar.

The favorites bar in the PRO.FILE user interface is by default displayed using the "Auto Hide" feature. This means that the favorites bar will always hide automatically when it is not needed in order to leave more room for the PRO.FILE user interface.

1. In order to display the favorites bar simply click the "Favorites" tab on the left hand side of the PRO.FILE user interface:

⇒ The list of favorites will now be shown. It will remain open until the mouse pointer leaves the favorites bar. It will then disappear again.
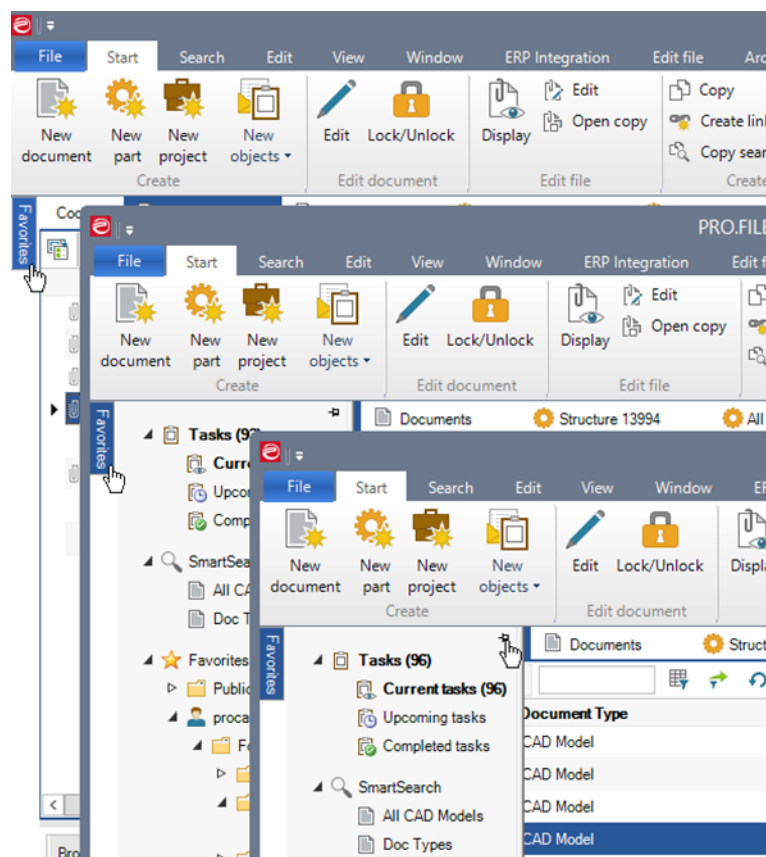
2. You can also choose to lock the favorites bar for continuous viewing by clicking the ◨ icon in the right upper corner of the favorites bar:

⇒ The favorites bar will now remain visible for your convenience.

3. If you have locked the favorites bar, the auto hide feature can be reactivated by clicking the 📌 icon.

6.1   SmartSearch: Create your own form

The search for data records using a SmartSearch offers users a saved search query in interactive form thus making the SmartSearch the perfect combination of the possibilities delivered by the search using saved searches and of those delivered by the search form.
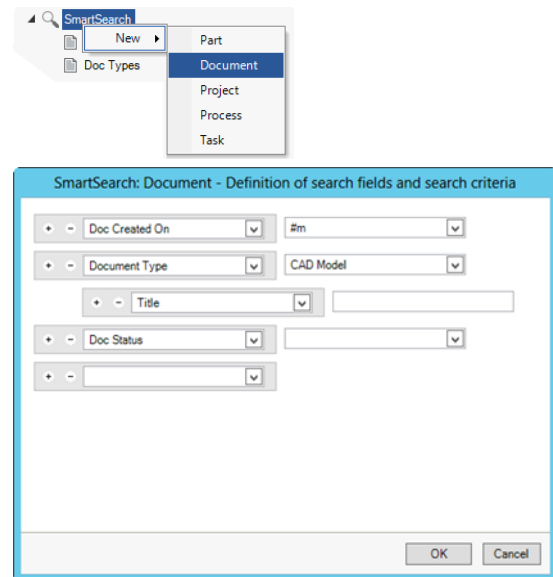
Using SmartSearch you can define your own search form:

• A SmartSearch is a search form that can be set up to contain only the desired number of fields. Now, less fields have to be filled in which drastically reduces complexity.

• A SmartSearch can include predefined search fields with preset search parameters (like the favorites) as well as search fields without search parameters (like the conventional search). The search mask thus remains interactive without having to manually complete every field.

• Users are also given the possibility to make a fast and easy addition to the SmartSearch at any time in order to include a field that is required for the search at hand.

• Each user can define any number of SmartSearches.

• The SmartSearch can be used for parts, documents, projects, processes and tasks.

For details see the following sub-chapters:

• [Access an existing SmartSearch](#)

• [Create a new SmartSearch](#)

• [Transform a completed standard search into a SmartSearch](#)

- [Permanently change an existing SmartSearch](#)

- [Delete a SmartSearch?](#)

- [Rename a SmartSearch](#)

6.1.1   Access an existing SmartSearch

Because the SmartSearches are somewhat related to the saved searches, they were positioned in the same area on the left hand side of the PRO.FILE interface. They are displayed as an independent branch above the favorites:

In order to access a SmartSearch simply place the mouse pointer on the desired SmartSearch entry and double click it with the left mouse button. (You can also use the right mouse button => "**Show**").
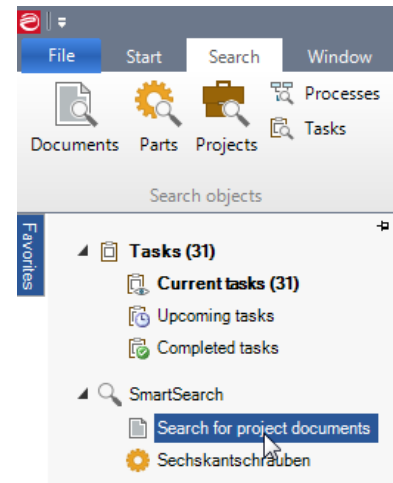
The stored SmartSearch will now be displayed as shown in the example below:
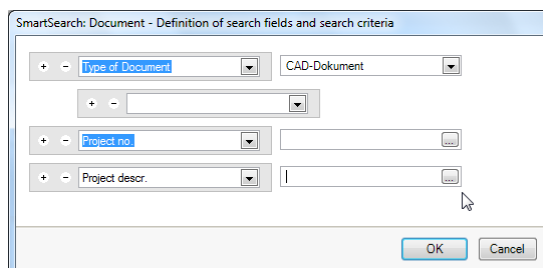
Because a SmartSearch is usually comprised of only a few fields, these are simply arranged one below the other. The fields for a key characteristics list for parts or for variable document characteristics for documents are indented according to their structural depth.

The field name for each field can be found on the left hand side. The same names are used as in the standard search form. The entry field for the entry or selection of your search criteria is on the right hand side.

Users can now fill in the fields, change preset values in the entry fields, or even add new fields. (This is explained in the following chapter "[Add more fields after accessing a SmartSearch](#)".

So if you want to narrow down your search, simply use the field on the right to specify your search criteria according to the field name on the left. If available, you can also select values from the drop down menu ⯆.

Note:

If required fields are defined within the standard search form then these will also be displayed as required fields in the SmartSearch. They are marked in red and have to be filled in. The same is true for the selection functions and the expanding field entries.

The actual search is then run by pressing the <**OK**> button.

The results of the SmartSearch are displayed in a new window. They include all data records that match the criteria of the SmartSearch.

If the search is repeated by clicking the "**Change search**" icon, the previous SmartSearch will reappear:
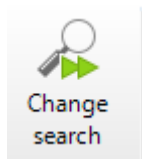
Add more fields after accessing a SmartSearch

If required, you can always easily add new fields, preset fields, or delete fields after accessing a SmartSearch in order to include additional criteria in the search.

Attention:

However, there are two ways to use these added fields in the SmartSearch:

Permanently
In order to permanently add fields to a SmartSearch so that they will be available for all future searches using this SmartSearch, the SmartSearch has to be saved in the editing mode. Please refer to chapter: "Permanently change an existing SmartSearch".

Temporarily
The fields are added for a single current search only. The next time you access the SmartSearch, the fields will not be available anymore. The SmartSearch will have gone back to its stored status. The added fields are only used once to temporarily include additional search criteria. The corresponding procedures are described in this chapter.

These added fields are used only temporarily for the current search. Once the SmartSearch is accessed again it will be displayed as stored – without the added fields.

Proceed as follows

1. Access the desired SmartSearch from the list by double-clicking it.

2. In order to add another field, simply click the + icon of the preceding field on the desired level.
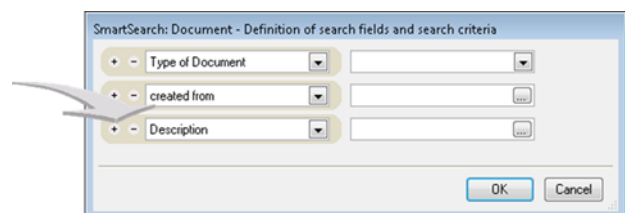
> **Note:**
>
> Fields that are related to the document type or to the key characteristics list are always indented to show their dependencies. A new field will always be displayed on the level on which the ⊕ icon was selected.
>
> - If the ⊕ icon of an indented field is selected, an additional indented field will appear, if available.
>
> - In order to obtain an additional, non-indented field, simply click the ⊕ icon of a preceding field on the first level.

- An empty field will appear. You can now use the drop down menu 🔽 to select an appropriate field from the list and name the new field. All fields that are available in the standard PRO.FILE search mask are also available for selection.
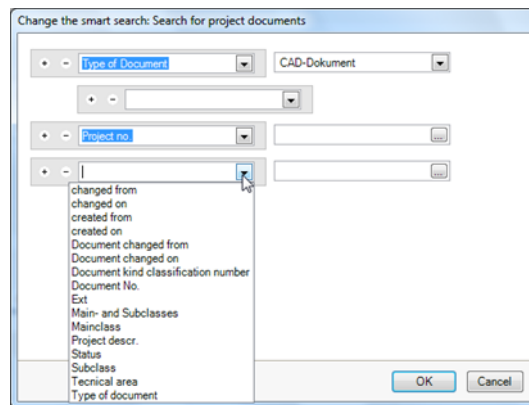
- Once you have selected a search field, the new entry field will appear. You can now enter the corresponding search criteria:
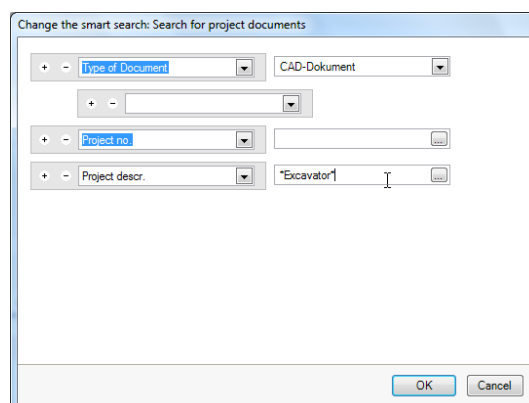
- You can now add further fields by following this procedure. Start your search by pressing <OK> once you have included all of the desired search criteria.

- The documents or parts found with these criteria will be displayed in a list view in the PRO.FILE user interface.

Note:

Fields that are not configured within the standard search form cannot be included in a SmartSearch.

In order to remove fields that are no longer required, simply click the ⊟ icon of the field you want to delete.

If there are any structure-relevant subentries to this field these will have to be deleted first.

6.1.2 Create a new SmartSearch

1. Creating a new SmartSearch is very easy. Simply follow these instructions:
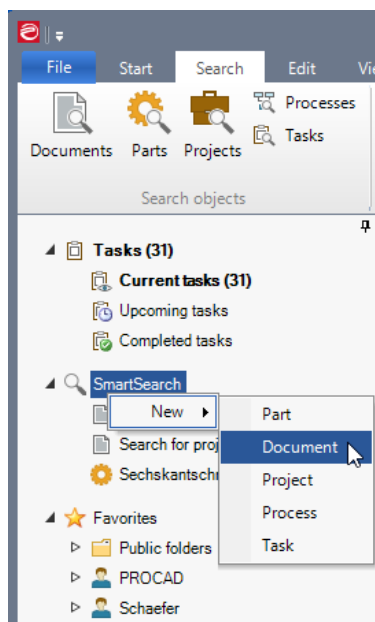
If you want to define a new SmartSearch that will remain available to you, please mark the list item SmartSearch that can be found above the list of favorites. Then use the context menu of the right mouse button to access the functions "**New**" => "**Part**", "**Document**", "**Project**", "**Process**" or "**Task**".

You have to decide whether you want to create a SmartSearch for documents, parts, projects, processes or tasks. Naturally, there are different selection fields for the different object types.

⇒ A window will appear in which you can define the fields and field values that are to be used.
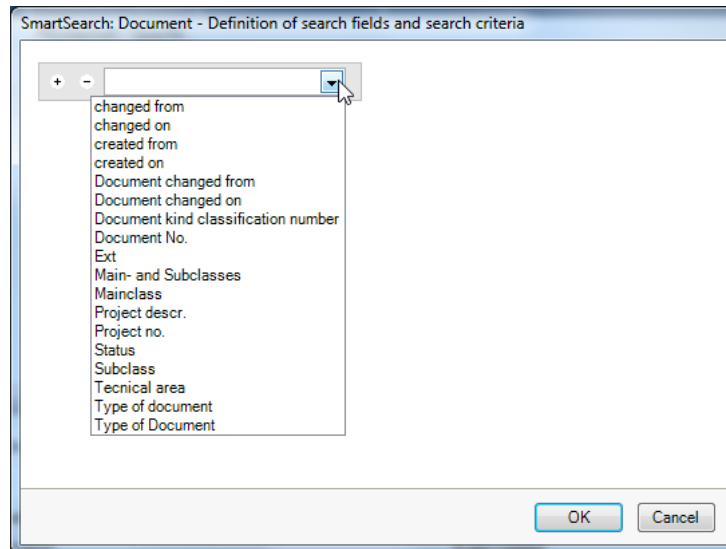
Use the drop down menu [icon] to select the first field you want to include in the SmartSearch.

2. After you have selected an entry from the list, the field name will be displayed and another field will appear next to it into which you can enter the field values.
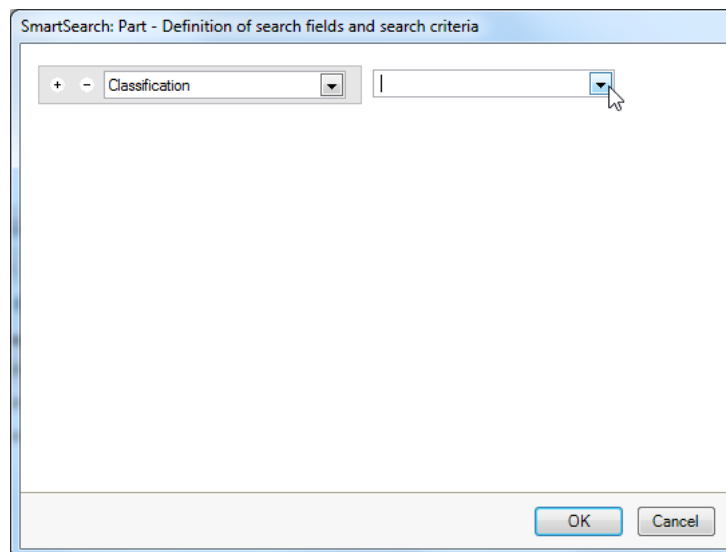
If any selections are defined for this field these are available through the [icon] icon for the entry of the field value. (Please also refer to the following subchapter "Field types available for the creation of a SmartSearch").

3. **Additional fields on the same level:** By clicking the [+] icon you can add additional fields on the same level. They are then determined the same way with field name and entry field for the field value.
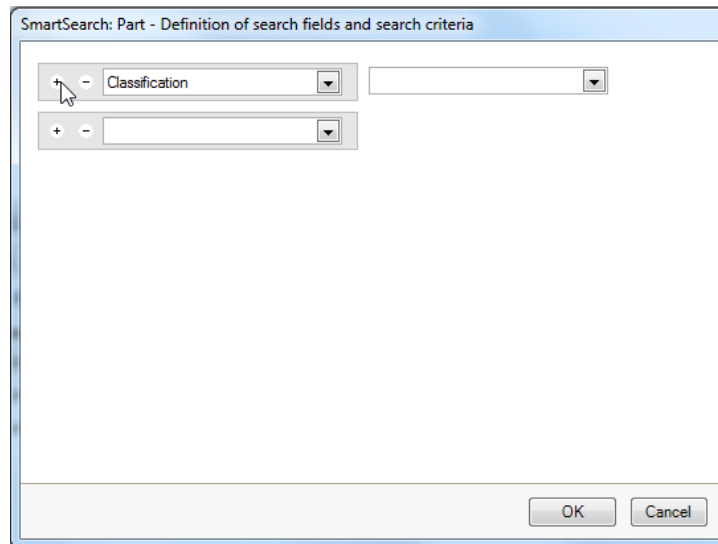
4. Additional fields on structured levels: If a field value is entered within a structure-relevant field (item class or document type), another structure level is automatically created in which the fields of the related structure level are displayed. In order for you to be able to select fields on every structure level, at least one field (even an empty field) has to be displayed:
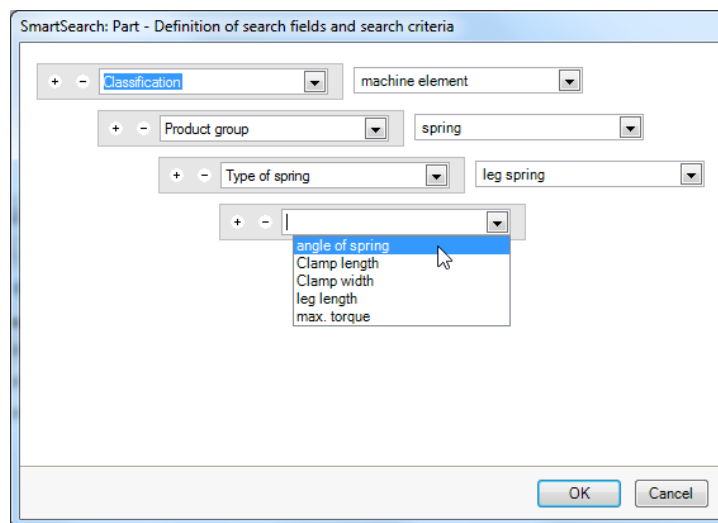
If all fields of a structure level are already configured in the SmartSearch, no new fields can be added through the ⊞ icon.

Note:

Fields that are related to the document type or to the key characteristics list are always indented to show their dependencies. A new field will always be displayed on the level on which the **+** icon was selected.

If the **+** icon of an indented field is selected, an additional indented field will appear, if available.

In order to obtain an additional, non-indented field, simply click the **+** icon of a preceding field on the first level.

5. In order to further facilitate the execution of a SmartSearch, the defined entry fields can be preset with field values or left empty.

Preset fields can be overwritten at any time when later executing a SmartSearch.

6. Once a SmartSearch is completely set up with the desired field names, entry fields and preset fields it can be stored by pressing the <OK> button.

7. Another entry mask will appear in which you have to specify a name for this SmartSearch. You can also add a description of the SmartSearch:

Name and description are also stored after pressing the <OK> button.

⇒ The respective SmartSearch will then be available to you in the upper corner of the PRO.FILE info bar:
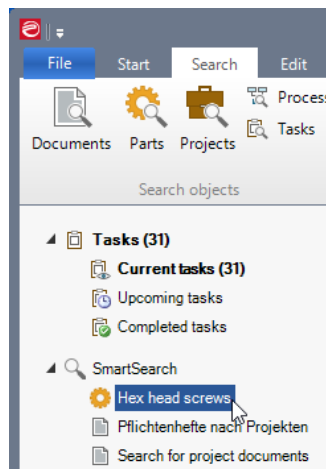
A SmartSearch can now be accessed by double-clicking the desired SmartSearch entry in the list.

> **Note:**
>
> Please keep in mind that a SmartSearch can be freely adjusted or modified upon accessing it. These changes, however, will only be temporary as described in chapter "Add more fields after accessing a SmartSearch" and will not be available to you when the SmartSearch is used again. To permanently change a SmartSearch please follow the instructions in chapter: "Permanently change an existing SmartSearch".

Field types available for the creation of a SmartSearch

The SmartSearch lets you use the fundamental fields that are also available for the PRO.FILE standard search.

- **Fields with entries of item classes / document characteristics:**
  Fields for an item class or for variable document characteristics are indented due to their structural depth.

- **Required fields:**
  If any required fields are defined in the search, they will automatically be included when defining a SmartSearch. However, it will be rather unusual to define required fields for search form.

- **Fields with expanding entries:**
  If a field is used when defining a SmartSearch that fills in additional fields through a reference list, then these fields will be automatically added to the SmartSearch.

- **Fields with selection functions:**
  The same selection functions as in the search form are available in the SmartSearch.

> **Note:**
>
> Fields that are not configured in the standard search form cannot be used for a SmartSearch. Only those fields are available that were set up for the standard search form by the administrator.

6.1.3 Transform a completed standard search into a SmartSearch

In addition to a manual definition of a SmartSearch, you can also choose to use a completed standard search as the basis for the definition of a SmartSearch.

The applied search criteria are stored when the search is completed and then used for a new SmartSearch. Please follow the instructions below:

Proceed as follows

1. Access a search using the PRO.FILE "**Selection**" menu and enter the desired search criteria. (Please refer to chapter "[Searches using the search form](#)" for more information).

2. The results will be displayed in a tab within the PRO.FILE user interface. Within this list of results, now select the function "Copy search criterion" from the "Modify" menu or from the context menu of the right mouse button:
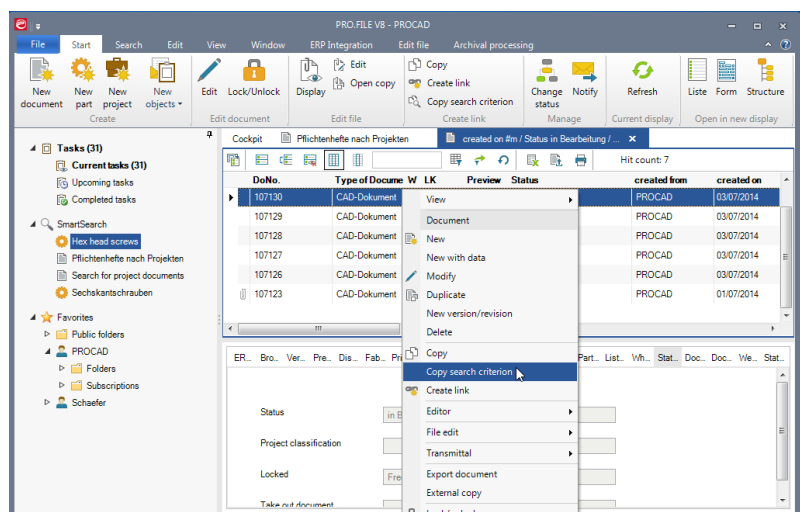
3. The third step is the creation of a new SmartSearch: mark the list entry "SmartSearch" in the PRO.FILE info bar and use the context menu of the right mouse button to select the command "**New**" => "**Part**", "**Document**", "**Project**", "**Process**" or "**Task**". The stored search fields will now be automatically displayed in the SmartSearch:
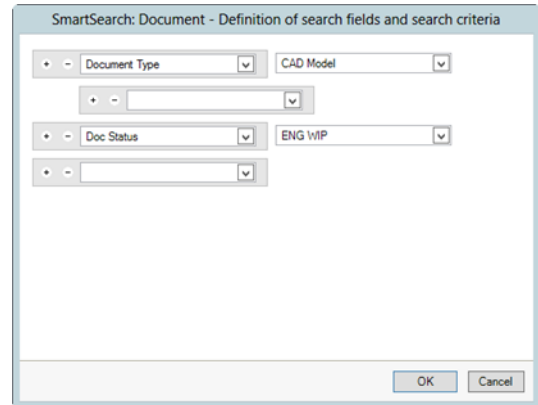
Note:

The object type of the SmartSearch that is to be created has to correspond to the object type of the stored search: if criteria for the search for documents were stored a SmartSearch for documents will be automatically created. A SmartSearch for parts can only be automatically created if the stored criteria were for parts as well.

4. This predefined SmartSearch can now, if required, be adjusted, abridged, or extended. It is also possible to include preset values.

5. The creation is then confirmed and stored by pressing the <**OK**> button.

⇒ Now all you have to do is add a name and a description (see chapter "Create a new SmartSearch") and the SmartSearch will be available to you in the upper corner of the PRO.FILE info bar.

6.1.4 Permanently change an existing SmartSearch

As already mentioned, there are two possibilities to change a SmartSearch.

- You can always apply **temporary changes** to a SmartSearch after accessing it by adjusting fields and preset values or by adding new fields. These changes will, however, only apply to the search at hand. They will not be stored in the SmartSearch and will not be available to you the next time you access this SmartSearch.

- **Permanent** changes to fields, preset values, and additional options within the SmartSearch will be stored within the SmartSearch and will be available to you every time you access this SmartSearch again.

In order to permanently change a SmartSearch, simply follow the instructions below:

1. Mark the SmartSearch whose search criteria you wish to change in the list of SmartSearches.

2. Use the context menu of the right mouse button to select the command "**Modify**" => "**Modify**":
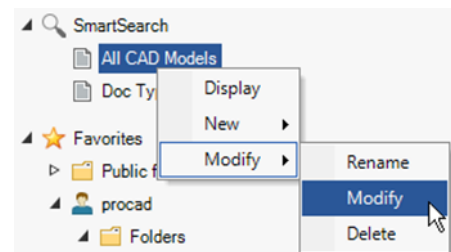
⇒ The current definition of the SmartSearch will be displayed:

3. You can now apply the desired changes to the SmartSearch. Please also refer to chapter "Create a new SmartSearch".
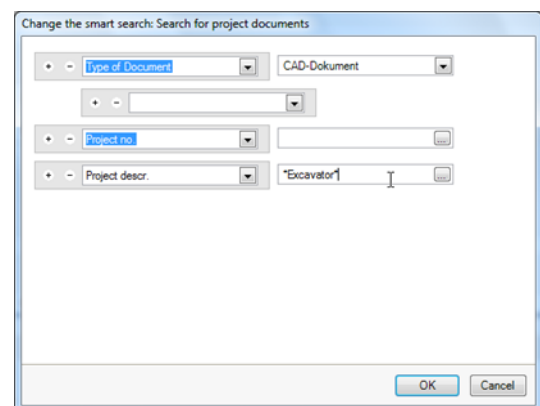
4. Once you have completed all changes store the SmartSearch using the <**OK**> button.

⇒ The changes will be stored and will be available to you every time you access this SmartSearch.

6.1.5 Delete a SmartSearch?

SmartSearches that are no longer required can be deleted from the list.

⚠️	**Attention:**
	The deletion of a SmartSearch is irreversible. Recovery is not possible!

Proceed as
follows

1. Mark the SmartSearch that you want to delete in the list within the info bar.

2. Select the command "**Modify**" => "**Delete**" from the context menu of the right mouse button:
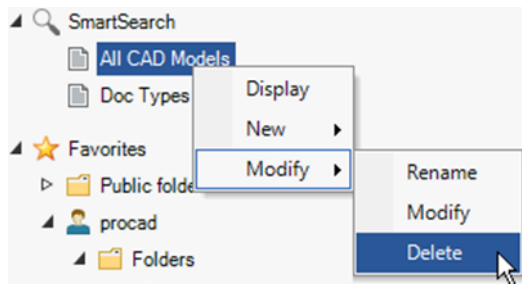
3. IF you really want to irretrievably delete the selected SmartSearch confirm the selection with "Yes":
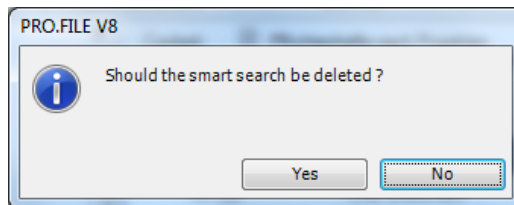
⇒ The selected SmartSearch will be irreversibly deleted from the PRO.FILE database.

Please refer to chapter: "Create a new SmartSearch" for more information on the creation of SmartSearches.

6.1.6   Rename a SmartSearch

Users can choose to adjust their SmartSearches and to apply permanent changes to them whenever they please. And so the original name that was given upon creation of the SmartSearch may sometimes become unsuitable.

If you want to change the name of a SmartSearch please follow these instructions:

1. Mark the SmartSearch that you want to rename in the list within the info bar.

2. use the context menu of the right mouse button to select the function "Modify" => "Rename":
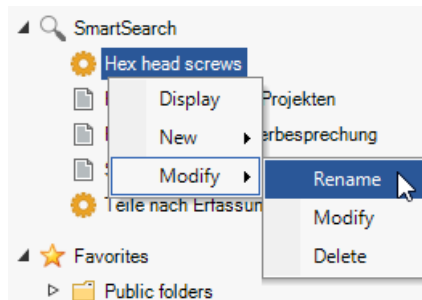
⇒ A window will appear where you can enter the name and the description:
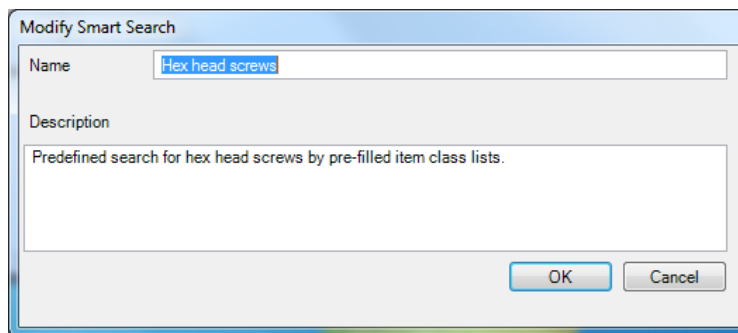
Now change the name of the SmartSearch and, if required, its description.

3. Close the window and save your changes by clicking <OK>.

⇒ The change of the name of the SmartSearch will now be displayed in the PRO.FILE info bar.

6.2 Saved searches and subscriptions

Saved searches offer additional possibilities, including the automated performance of such searches upon PRO.FILE start

All information on favorites:

* [What are saved searches and subscriptions?](#)
* [Working with saved searches and subscriptions](#)

6.2.1 What are saved searches and subscriptions?

Another useful tool for quick and structured calling up of the regularly used documents, parts, projects, and transmittals saved searches in PRO.FILE

This allows for favorite documents being quickly accessed without going through data selection forms. Then, results are displayed in a document list.

A simple mouse click on one of the saved searches in the favorites list will display the list of documents, parts or projects that is specified for this saved search.

Here you can choose

* whether you want to use a saved search to define bookmarks for specific documents/parts/projects

* or if you want to include search criteria for such objects as a bookmark. Accordingly, all documents, parts or projects will be accessed that either correspond to the ID numbers or to the search criteria specified within the favorite.

In order to ensure that you are always automatically up to date, you can utilize subscriptions: A subscription can be created for any saved search. This subscription monitors a saved search. If changes are made to the subscribed documents, parts or projects, this is indicated in the information bar behind the respective subscription in brackets.
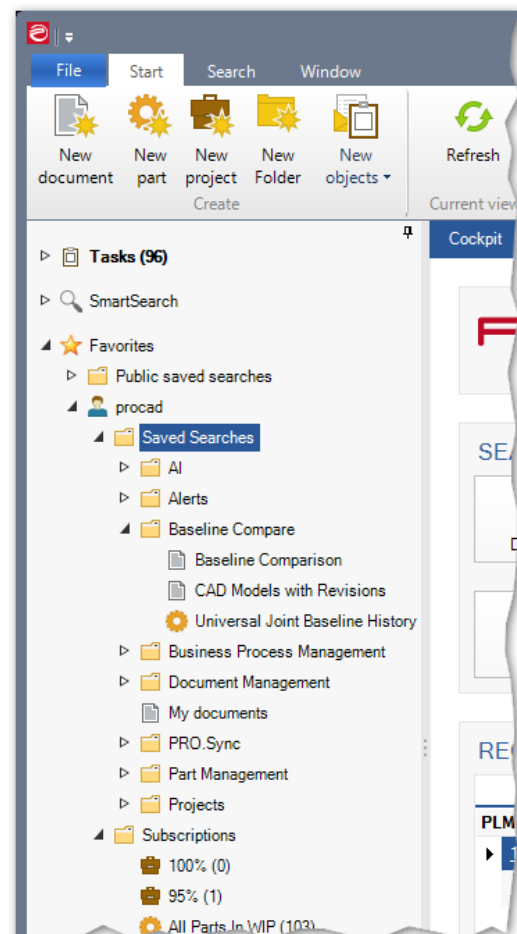
Accessing
documents, parts
or projects

Each user has the possibility to create a multitude of different saved searhces for specific documents, parts or projects and for frequently used selection criteria for the corresponding data records.

Using the favorite management, you have quicker access to:

- Any Documents, Parts and Projects

- Any Document lists, Part lists and Project lists

- Any selection criteria without having to enter data.
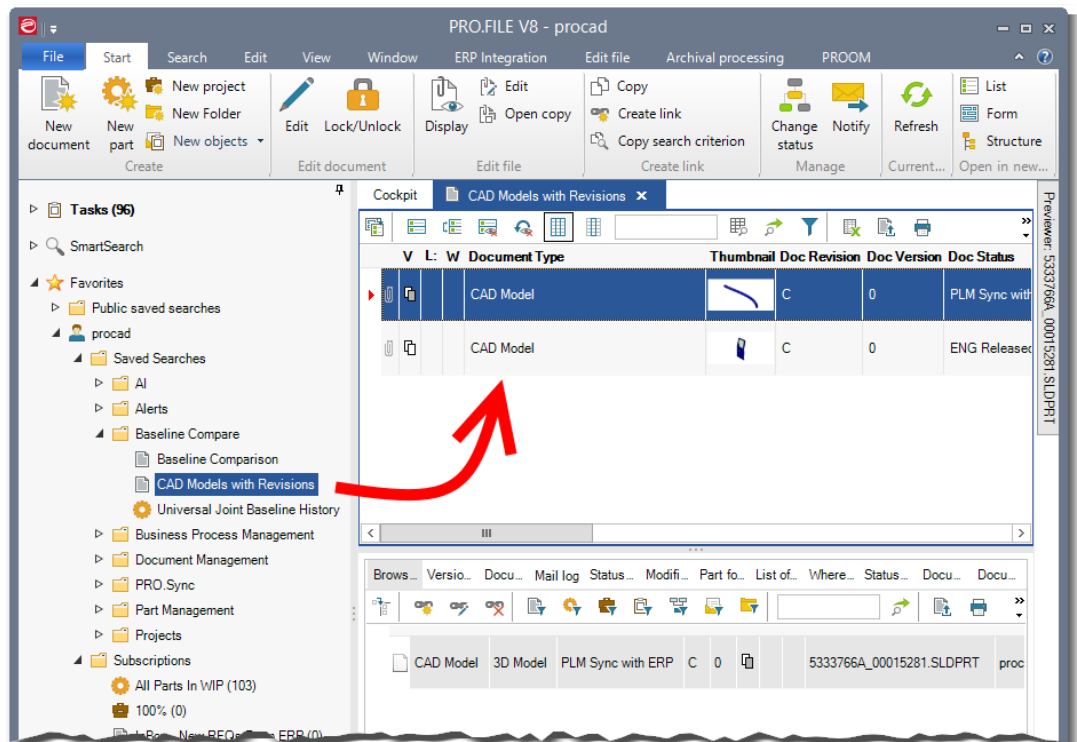
Saved searches
offer the following
possibilities

- Once defined, PRO.FILE allows you to make your favorites available to other users. You can display and use favorites of other users.

- In the "Public folders" you can deposit favorites for every other user to access.

- It is also possible to define a favorite as an Autostart-Favorite. When starting PRO.FILE, the documents and the parts of this favorite will automatically be loaded into the list presentation.

Saved searches can be presented, created, listed, administered, and activated in the favorites bar.

The favorites bar is accessed through the "Favorites" tab on the left hand side of the PRO.FILE user interface.

You can then lock the favorites bar for continuous viewing by clicking the ⊟ icon. The auto hide function of the favorites bar can be reactivated by clicking the 📌 icon.

The favorite overview presents the created favorites as an info-tree. The individual branches of this info-tree can be blended in or out with the use of a double mouse click.
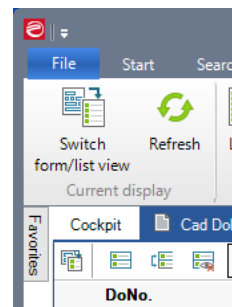
In this favorite overview, the saved searches of the actual user are shown under the user name. Also saved searches of other users can be called up via the corresponding user names.

Combine saved searches

A particularly helpful feature within PRO.FILE includes a function for modifying existing saved searches, by including or excluding documents or search criteria:

- For example, using a saved search you can organize documents, parts or projects along with common selection criteria, such as documents with IDs 17080 and 25098 along with the "e-mail" document type.

- Once defined, criteria for a saved search can be modified. You can include or exclude criteria as well as include those of other document types (e.g. the selection of all documents that have been released except "CAD" documents and documents that are older than ten days).

- Additionally, you can exclude objects from a saved search by explicitly excluding its ID.

- Relative time entries remain saved, and are re-evaluated at every new start.

The following chapters describe functions and handling of saved searches.

To keep you up to date: The subscriptions

For each saved search that you create, it is possible via mouse click to simultaneously create a subscription.

When PRO.FILE is started, a comparison is carried out in the subscription, to see if anything has been changed in the object of the saved search. A check will be run to see if new or changed objects exist.

If this is the case, the number of changes and reforms will be shown after the name of the subscription in brackets, in the PRO.FILE info bar.
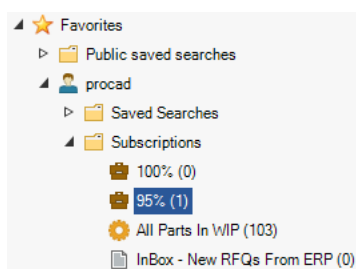
These displayed changes can then, with the click of the mouse, be called up in the form of a list on the subscription in PRO.FILE.

6.2.2 Working with saved searches and subscriptions

PRO.FILE introduces the ability to use saved searches for quick access to frequently used data objects and documents. For access to the commands and functions, the favorites administration offers a context menu.

Right-clicking the mouse in the list of saved searches will display this menu.

With this editing menu all actions connecting the favorites administration can be executed.

This menu contains the following functions:

- **Display**: displays the contents of a saved search or a subscription in the form of a list. This function can also be applied by a double click on the desired saved search or subscription in the favorites bar.
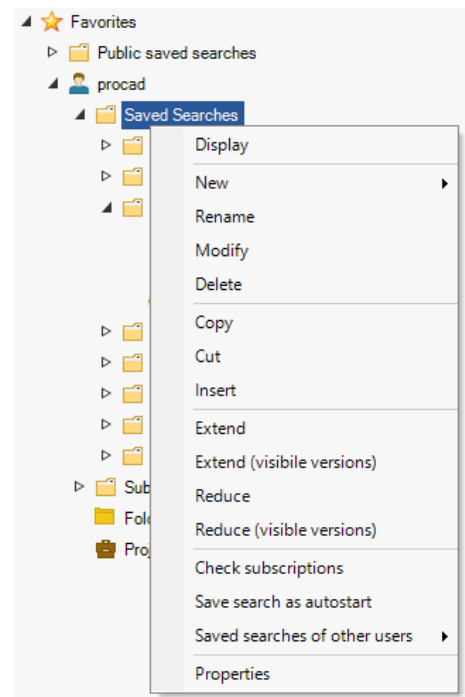
- **New**: The menu allows users to create saved searches and subscriptions. A structure can be built by creating sub-folders, which allows for the organization of saved searches. To find out more about the creation of saved searches and subscriptions please refer to the chapters:

    - [Create a new saved search](#)

    - [Create a new subscription](#)

    - [Create folders to structure the favorites](#)

- **Rename:** Renames an existing saved search or structure folder. It is also used to modify the description of the saved search. The contents of the saved search will remain unchanged.

- **Modify:** This function allows the editing of the saved search with respect to the memorized objects and search criteria. See also the chapter "[Change the contents of saved searches](#)".

- **Delete:** Removes a saved search or subscription from the favorites list. See also the chapter "[Delete saved searches and users from the list](#)".

	Caution – undo is not possible:
	This command will irretrievably delete saved searches and subscriptions.

- **Copy, Insert:**
  Function to copy a saved search – even a saved search of another user. See chapter: "[Copy](#)" for further information.

- **Move:** Using the functions "Cut" and "Insert", you can move saved searches and subscriptions and their superior folders via the PRO.FILE clipboard to another folder. Structure folders, saved searches and subscriptions can also be moved to other positions of structure, using drag & drop. See chapter "Moving saved searches, subscriptions and their folders using drag & drop" for further information.

- **Extend / Extend (visible versions**): Using the respective function, the selected saved search (i.e. the search criteria it contains) is enhanced by the contents of the PRO.FILE clipboard. This is applies for documents in the clipboard as well as for search criteria. See also "The functions "Extend" and "Reduce"".

- **Reduce / Reduce (visible versions):** Using this command, the existing saved searches are reduced by the contents of the PRO.FILE clipboard. This applies for documents in the clipboard as well as search criteria. See also the chapter "The functions "Extend" and "Reduce"".

- **Check subscriptions:** Subscriptions inform the user of the changes to the elements in the respective saved search. The subscriptions are automatically updated when PRO.FILE is started. This function is available to give an updated version of the subscription whilst working in PRO.FILE.

- **Saved search as autostart:** Using this function, a saved search can be set up, so that when PRO.FILE is started it is opened immediately. The contents of the saved searches are then immediately displayed in the form of a list. If a saved search is set as autostart, "(Auto start)" will be noted in parentheses after the name of the saved search.

- **Saved searches of other user:** Enables a user, with the help of the sub functions "Display" and "Hide", to access the saved searches of another user and also to hide them, without having to create them personally. "Show" and "Hide" always relate to all saved searches and subscriptions of a user.

- **Properties:** Shows the properties windows of the saved search. This window contains the name of the saved search and a field with detail information on the saved search.

Moving saved searches, subscriptions and their folders using drag & drop

Saved searches, subscriptions and the folders of their relating structures, can be moved and sorted by simple use of the drag & drop method.

To do this, click on the required folder, saved search, or subscription, and drag the mouse pointer to the new position, keeping the mouse button held down until you are in the new position.

Note that folders, Saved searches, and subscriptions can only be attached to other folders in the structure, not to other Saved searches or subscriptions.

6.2.3	Create a new saved search

With the favorite administration of PRO.FILE document lists can be created and can be stored by a favorite name for a recall.

Using PRO.FILE favorites management, you can define two different kinds of favorites:

- **Static**: You can define a list of objects to be found by the saved search. You may include or exclude further objects of the same type at a later time for this saved search.

- **Dynamic**: You can define search criteria for objects via a saved search. When using search criteria with a saved search, PRO.FILE first initiates a selection on all affected objects in the database and then displays the results in a list.

Creation of saved searches is always based on data stored in the PRO.FILE Clipboard and therefore requires that you use the "Memorize" function to assign objects with a saved search.

A saved search can be made up from individual documents ("**Copy**") or from criterion ("**Copy search criterion "**). The criteria for this search represent the foundation for the saved search. After the search results have been displayed in the list or form within PRO.FILE, the search will be saved in the interim save in PRO.FILE, with:

- **"Copy"**: When the saved search should contain the exact contents of the search.

- **"Copy search criterion"**: When the saved searchis to be made up of the criterion that makes up the search result.

	Note:
	A saved search can only display one type of object within a list. It is not possible, e.g. to display documents and projects in the same list.

Proceed as follows

Create a static saved search

1. Select the desired data records in a list.

2. Choose one of the following functions from the context menu using the right mouse:

3. "Copy"

Create a dynamic saved search

1. Start a search with a search form. Use the search criteria to be stored in the saved search.

3. "Copy search criterion"

4. In the node named with your user-name on the left side of the favorites bar select the node named **"Saved Seaches"** (or one of its sub-folders).
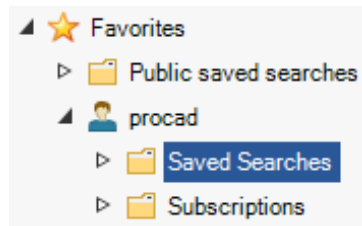
5. Select the function "**New**" => "**Save new search**" from the context menu (right mouse button).

6. Enter a name and description for your saved search.

7. Confirm with **<OK>**.

⇒ The saved search is thus created and available in the list of saved searches.

⇒ Double-clicking the saved search will result in PRO.FILE displaying the memorized data records or the results of the search criteria memorized.

The functions "Extend" and "Reduce"

The Extend and Reduce commands are very helpful in managing saved searches.

- They are used to modify the contents (documents and selection criteria) of a saved search.

- When these commands are used, the PRO.FILE Clipboard is checked for objects and attributes to be included or excluded to/from a saved search. This works for objects as well as for selection criteria.

- Particular objects can be excluded from a favorite with the command "Reduce". The "Reduce" command is also used to define exception rules when a set of search criteria is to be saved.

On the following pages we illustrate working with favorites using an example:

Note:

A saved search can only display one type of object within a list. It is not possible, e.g. to display documents and projects in the same list.

6.2.4   Example: creation, enhancement and reduction of saved searches

Let's assume that a user often access three particular product specification documents. The user can create a saved searcg for convenient and quick access. The documents are already shown in a document list.

1. To collect the documents with a saved search, the user selects the three documents in a document list window.Next, the **"Copy"** command is called (using the right mouse button or from the **"Edit"** menu).
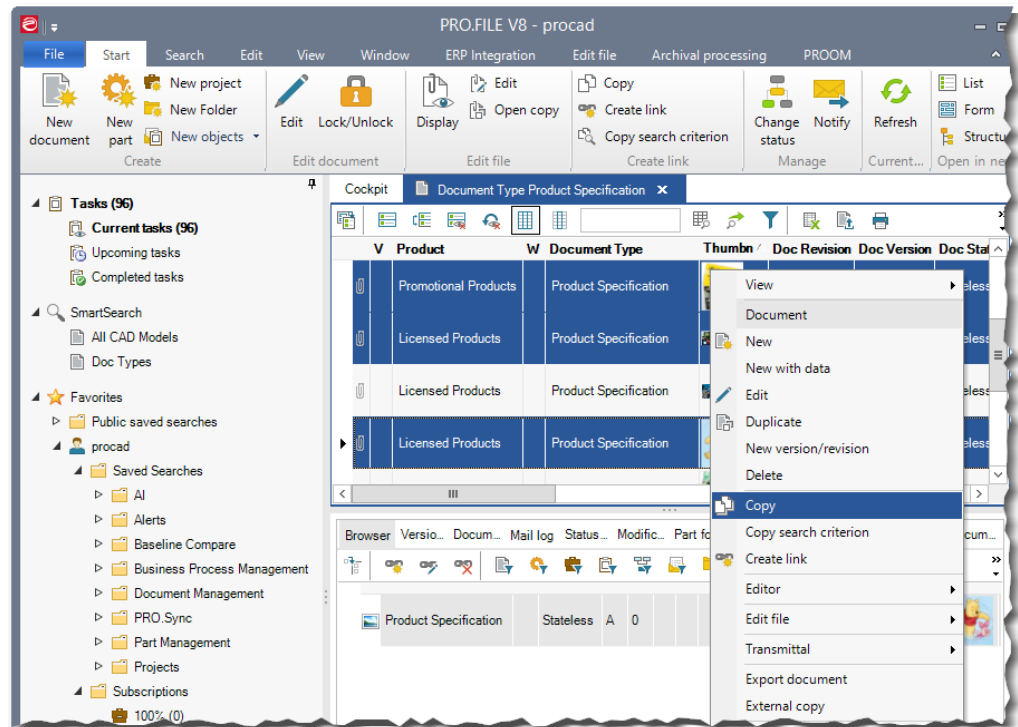
⇒ This results in PRO.FILE adding these three documents to the PRO.FILE Clipboard.

The next step is to activate the list of saved searches in the favorites bar. Now we can create a new saved search:

2. Right-click the mouse, then select the **"Save new search"** command. PRO.FILE creates a saved search and includes the documents stored in the PRO.FILE clipboard with it.
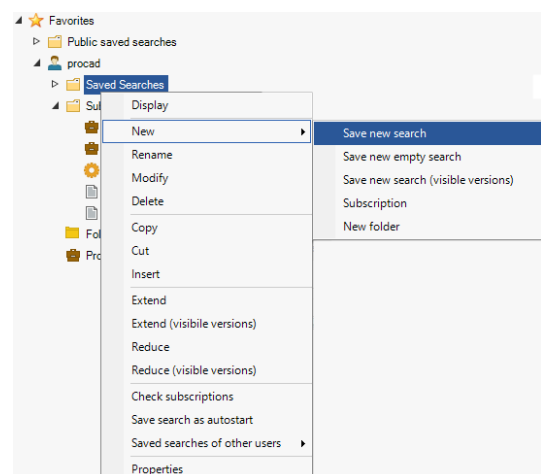
3. Upon creation, PRO.FILE displays a form prompting for a name to be given to the saved searcg. In this example, we have entered "My documents". A description of the saved search can be added as well.

Save new search:Document

Name   My documents
                ☐ Documents + Parts
Description

My product specification documents

                                    OK   Cancel

4. Confirm your input with **<OK>**.

⇒   PRO.FILE updates the list of saved searches to include the new one.

Double-clicking the saved search will result in PRO.FILE displaying a window containing a list with objects that have been defined for the favorite.

Enhance the search

Now we want to enhance the definition of the saved search by all order documents that the user is allowed to see. To accomplish this, we would like to add a document selection using only one criterion (document type equals "Order").

5. To add the search criterion to the saved search, we initiate a select command for documents. When the selection form is displayed, we enter "Order" in the document type field.

⇒   PRO.FILE displays all existing and for this user accessible orders in a document list window.

6. We can now initiate the process for adding the search criterion to the saved search by selecting the "Copy search criteria" command from the "Edit" menu. You can access the "Edit" menu by right-clicking the mouse or by selecting it from the PRO.FILE menu bar.

⇒   PRO.FILE memorizes the criteria used for the search, the results of which are displayed in the current list.

7. We have to switch to the favorites window for adding the criterion to the saved search. Select the saved search you would like to add the criterion to; in our example this is the saved search "My documents". Then, select the "Extend" command from the context menu.

⇒   With the command "Extend" the search criterion is now included in the favorites definition.

8. Now, what happens if you double click the saved search "My documents"? The 3 specification documents are displayed and a document selection with the document type equals "Order" criterion is executed.

⇒   Then, PRO.FILE displays all found documents in a document list window.

Comments: Saved searches may also be extended by actual documents. To do this, you highlight the desired in a document list, copy them to the PRO.FILE Clipboard and add them to the saved search using the "Extend" command after selecting the saved search "My documents" inside the favorites window.

Reduce the search After investigating the document list we notice that it also includes documents that are in the "Approval" workflow state. We would like to exclude these documents.

⇒ We can accomplish this by excluding these documents from the saved search.

9. Just like with including documents, we initiate a document selection. When the form for entering search criteria is displayed, we enter "Approval" in the workflow state field. PRO.FILE now displays a window with a list of all documents that are accessible for this user and that are in the "Approval" workflow state.

10. As with including search criteria, we right-click the mouse or activate the "Edit" menu form the PRO.FILE menu bar and select the "Copy search criterion" command.

⇒ PRO.FILE then copies these criteria to the PRO.FILE clipboard.

11. We have to switch to the favorites window to add this criterion to the saved search.

⇒ The "Reduce" command results in excluding the documents for which the above search criterion (workflow status equals "Approval") applies. Activation of the "My documents" favorite will result in an object selection based on these criteria: All documents for which the document type equals "Orders" except documents that have the "Approval" workflow status assigned.
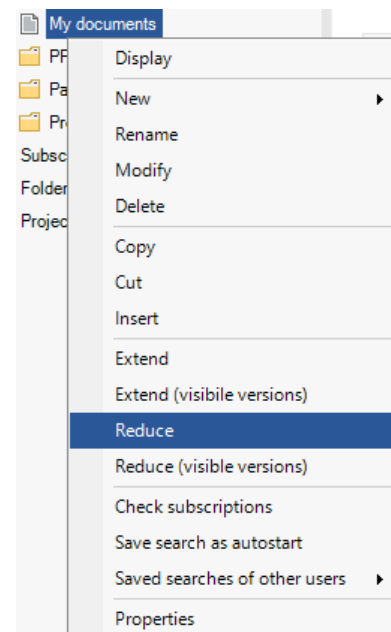
The result Now, what happens if you double click the "My documents" favorite? The 3 quote documents are displayed and a document selection with the document type equals "Order" criterion is executed. Then, PRO.FILE excludes all documents that have the "Approval" workflow state assigned from this list. Results are displayed in a document list window

Comment: Saved searcges may also be defined to exclude actual documents. To do this, you highlight the desired documents (document no. 14360, i.e.) in a document list, copy them to the PRO.FILE Clipboard and add them to the definition of the saved search using the "Reduce" command after selecting the saved search "My documents" inside the favorites window.

6.2.5   Copy saved searches

Each save search that can be accessed can also be copied.

The context menu of a saved search contains the functions "Copy", "Cut" and "Insert"

- **Copy**: copies the selected saved search to the internal clipboard.

- **Cut**: copies the selected saved search to the internal clipboard and removes it from its current position.

- **Insert**: inserts the copied saved search at the target location from the internal clipboard.
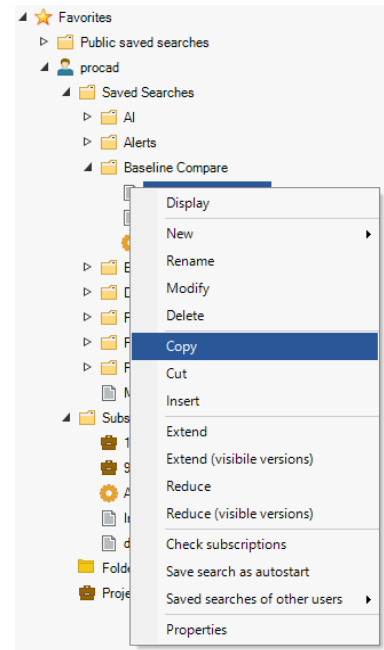
⇒   When the function "**Copy**" is used, a dialog for naming the resulting copy is displayed.

⇒   If the source is a folder, the folder with all sub-folders and saved searches in it is copied.

6.2.6   Create a new subscription

Subscriptions are always created in relation to a specific saved search. They monitor saved searches and inform the user of changes to the results of the saved search. The update of the saved search is made upon the start of PRO.FILE, or when the function **"Check subscriptions"** is selected from the context menu of the favorites bar.

If you want to create a subscription, a saved search has to be selected so that it can be monitored by the subscription. Then the command **"New"** => **"Subscription"** has to be called up from the context menu.

A subscription always has the same name as the saved search. It now appears in the subscriptions folder.

When changes occur in the results of the saved search, the amount is shown in parentheses after the corresponding subscription.
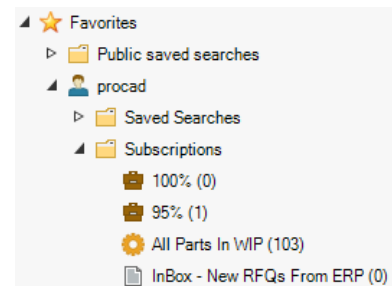
Attention:

Relative time entries in saved searches can sometimes lead to undesired effects in connection with subscriptions. This is especially the case if date ranges are set very tight, and the subscription is not updated regularly.

6.2.7   Saved searches with relative time entries

Relative time entries in saved searches can sometimes lead to undesired effects in connection with subscriptions. This is especially the case when date ranges are set very closely, and the subscription is not called up regularly.

Information on updates and changes are only shown for the set date range when the subscription is called up. If the time period of time that the subscription is not called up is longer than the time range of the saved search, the information about the updates and changes is incomplete.

You should be aware of this problem when setting up subscriptions!!

Example:

Let us assume the following: There is a saved searchefor a certain status that goes on the basis of the noted criterion. In the related subscription, the user is informed about newly created parts.

The saved searches is then activated, so that only new creation from this week (#w) will be considered. These criteria will of course then be taken on by the subscription. The information for the user will then always be correct, as long as the subscription is called up every week (Diagram 1).

In the diagram, in calendar week (W) 1, everything is ok.
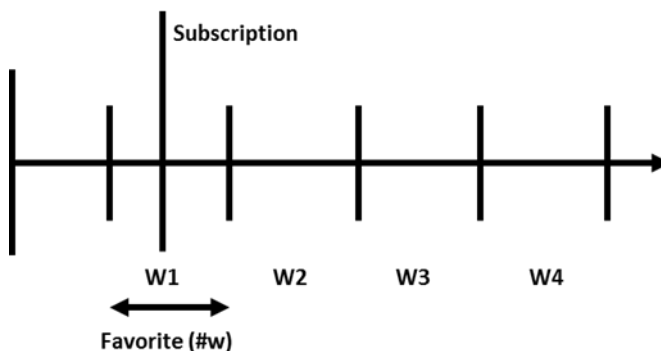
Then the user goes on holiday for two weeks, he comes back in calendar week 4.

When he now opens the subscription, he will be informed of the new creations in calendar week 4.

Due to the time setting in the subscription, he will also be informed of newly created parts in calendar weeks 2 and 3. As the saved searches then is set only to provide information on the actual week, the information from weeks 2 and 3 is filtered out.

The user will expect to be given results from weeks 2 and 3 as well as week 4. But he will not be informed of the changes in weeks 2 and 3, because of the limitations of the date range.
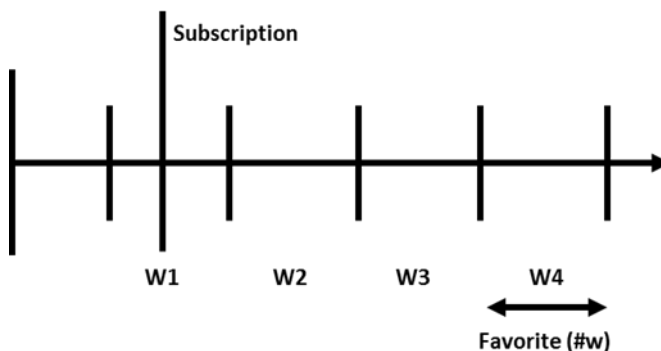
This example is designed to make the user aware of possible problems that can occur when using relative time entries.

This problem can be remedied by:

- Using a saved search with autostart instead of a subscription

- Using a saved search without relative time entries

- Using a saved search with a longer time range, so that each holiday is covered, (e.g.: (#30)-(#+30): the 60 days around today).

6.2.8   Create folders to structure the favorites

Users can create their own folders within the PRO.FILE favorites bar in order to structure their saved searches and subscriptions.

Note:

The creation of a folder structure in the "**Public folder**" area is only possible for users who have the access right "**Writing access to public folders**".

The folders are created within the structure of saved searches. Simply follow the instructions below:

- Mark the folder within the structure to which you want to attach an additional subfolder.

- Select the function "**New**" => "**New folder**" from the context menu of the right mouse button.

- Enter the name for the subfolder that is to be created. Try to select a self-explanatory name in order to facilitate your future work with this folder.

- You can enter a description in addition to the folder name. This description will facilitate the flow of information on the purpose of the created folder.

- Please confirm the creation of the folder with <**OK**>.

The created folder will now be displayed in the structure. You can now move this folder within this structure or place existing saved searches in this folder using drag and drop. Please refer to chapter "[Moving saved searches, subscriptions and their folders using drag & drop](#)" for more information.

Note:

Folders can only be created underneath an existing folder.

6.2.9   Change the contents of saved searches

This function allows you to:

- display and delete the ID numbers of a saved search.

- display, modify and delete the criteria of a saved search.

- delete or modify individual criteria for extended or abridged saved searches.

In order to edit a saved searchsimply follow these instructions:

1. Mark the saved searchyou want to modify in the list of saved searches.

2. Select the function "**Modify**" from the context menu of the right mouse button.

The criteria and ID numbers that are stored for the saved search will now be listed in a new window:
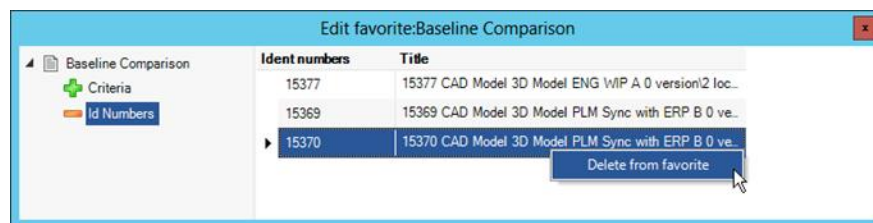
The left column of the mask displays the applied criteria or the stored ID numbers of the saved search.

Criteria and ID numbers are indicated as follows:

- With ✚ for factored criteria and ID numbers.

- With ▬ for excluded (abridged) criteria and ID numbers.

If the entry "Criteria" or "Ident numbers" is marked in the left column the corresponding values will be displayed in the right column.

Individual contents of the applied search criteria or individual ID numbers can be deleted from the saved searches using the context menu of the right mouse button, as shown in the above illustration.

The stored criteria and ID numbers as well can be edited in the left column of the mask.
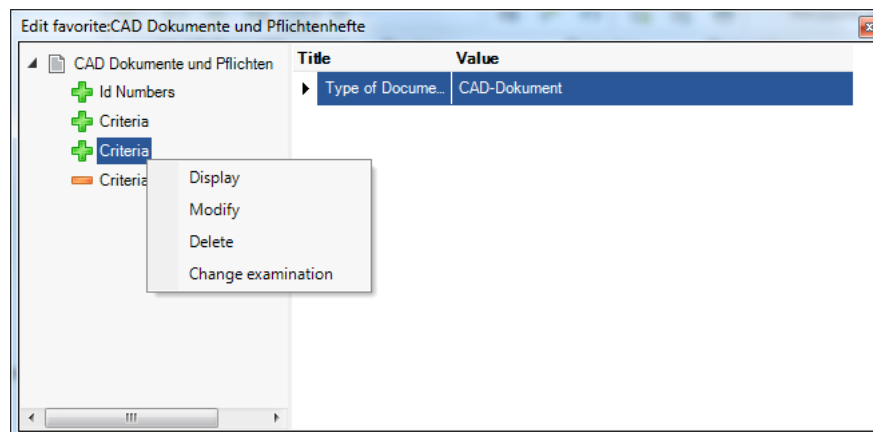
Mark the respective entry and use the following functions from the context menu of the right mouse button in order to do so:

- **Display:**
  Shows all objects found using the ID number or stored criteria.

- **Modify:**
  Allows you to modify or supplement stored criteria.

- **Delete:**
  Irretrievably deletes stored criteria or ID numbers from the saved searches. It is not possible to undo this deletion!

- **Change examination:**
  This function specifies for memorized objects (memorized via ID number), whether the newest visible version is to be found or the exact memorized version.

6.2.10   Delete saved searches and users from the list

The function "**Delete**" lets you delete a marked saved search, subscription or folder including the corresponding bookmarks from the list of saved searches. This will only delete "bookmarks" but no documents.

	Caution – undo is not possible
	This command will irretrievably delete saved searches and subscriptions.

In order to delete a subscription, saved search or folder simply follows these instructions:

1. Mark the subscription, saved search or folder that you want to delete in the list.

2. Select the command "**Delete**" from the context menu of the right mouse button.

3. Confirm the deletion
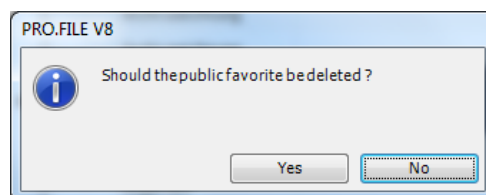
⇒   The selected subscription, saved search or folder will now be irretrievably deleted!

	Attention:
	You should make sure that you no longer need the saved searches contained in a folder, since these will be deleted along with the folder.

6.2.11   Access other users' saved searches

The PRO.FILE favorites management allows for adding and maintaining saved searches defined by other users to the list of your own searches.

To do this, the user is added to the favorite overview using the functions **"Saved searches of other users"** => **"Show"**, and by doing this, all of the existing favorites of the actual user are made visible (this depends on the user authority level).

Note:

For the display of saved searches of other users, you need the corresponding function access right.

Proceed as follows

1. Open the list of saved searches and select the function "**Saved searches of other users**" => "**Display**" from the context menu.

2. A selection screen will now appear, from which you can choose the user whose saved searches should be displayed. In this mask the name can be selected from a list via the selection button ☑.

⇒   The saved searches of the selected user are displayed in the list of saved searches.

Hiding other users from the list

In order to hide a user from this list, simply select the respective user in the list of saved searches and select the command "**Saved searches of other users**" => "**Hide**" from the context menu.

6.2.12   Public saved searches

PRO.FILE gives you the possibility to save searches to a public folder as well.

Saved searches in the folder "Public saved searches" are available to all users within the same PRO.FILE database.

Saved searches in the public folder have to always be created in this folder because a separate authorization is required for the creation.

The procedures for creating, deleting, editing and further managing saved searches in the public folder are the same as the general procedures for saved searches that are described in the previous chapters.
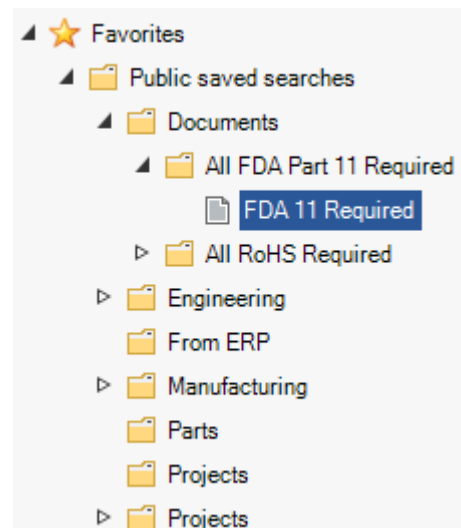
	Note:
	Users need the corresponding function access rights in order to make saved searches available and to manage them in the public folder. These are administrated via the PRO.FILE Management Console.

6.3   Working with folders

Folder:Definition   Folders are PRO.FILE Objects used for the structuring of data and for the quick saving of files in PRO.FILE.

As a simple structure object, folders are neither subject to the status network nor to the version chain.

Detailed information on working with folders can be found in the following sub-chapters:

- [Folder types](#)
- [Create, edit and delete folders](#)
- [Data structure with folders](#)
- [Duplicate folder](#)
- [Display and manage folders in the favorites bar](#)
- [Quick saving of files via drag & drop](#)
- [Configure folders for quick save](#)
- [Delete fast-check-in configuration of a folder](#)

6.3.1   Folder types

There are different types of folders available:

- Default folder: A PRO.FILE object for structuring your data and for the quick saving of files, as described in the following chapters.

- Valid/invalid template: Templates for folder structures including linked documents, parts and tasks that can be used for the work without projects. These templates can be duplicated, as long as the type of the folder is set to "valid template".
  If the type is set to "invalid template", the folder cannot be duplciated.
  See also the chapter "[Duplicate folder](#)".

- Valid project template / invalid project template: Folders can be used to define structure templates that can be applied for the creation of projects.
  For details, see the manual "Operation PRO.CEED Base"

> **Note: function access rights**
>
> Please note that the usage of the functions described in the following sub-chapters requires the corresponding function access rights. If required, please contact your PRO.FILE administrator.

6.3.2   Create, edit and delete folders

This chapter details the functions for creating, editing and deleting folders in PRO.FILE.

Create a new folder

Proceed as follows

1. Select the function "**New folder**" either from the menu "Start" or in the PRO.FILE Cockpit.

   ⇒ The form for the creation of a new folder is displayed.

2. Enter the information for the description and classification of the folder into the corresponding fields.

3. For the field "Type" see the chapter "[Folder types](#)".

4. Confirm your entries with <**Finish**>.

   ⇒ The new folder is now displayed in the tab "New folders" and can be used as structure object for documents, parts and tasks.

Edit an existing folder

To change the description of a folder or to rename it, Proceed as follows

1. Use the PRO.FILE search functions (see chapter "[Searching and finding: selecting data records](#)") to display the folder to be changed in a list or form.

2. If displayed in a list, select the desired folder.

3. Select the function "**Modify**" either from the "Edit" menu ribbon or from the context menu.

   ⇒ The form for editing the folder description is displayed.

4. Make the desired changes.

5. Confirm your changes with <**Modify**>.

   ⇒ The folder description is changed and the updated folder description is displayed.

Delete a folder

To delete a folder Proceed as follows

1. Use the PRO.FILE search functions (see chapter "[Searching and finding: selecting data records](#)") to display the folder to be deleted in a list or form.

2. If displayed in a list, select the desired folder.

3. Select the function "**Delete**" either from the "**Edit**" menu ribbon or from the context menu.

⇒   You are now prompted to confirm the deletion of the folder.

Attention – Undo not possible:

The deletion of a folder cannot cannot be undone.

4.   If you really want to delete the folder, confirm the dialog with <**Yes**>.

⇒   The folder is deleted from PRO.FILE.

⇒   If the folder was linked in the favorites bar, it is also removed there.

⇒   Links of the deleted folder to documents, parts, projects or tasks are also deleted.

6.3.3   Data structure with folders

Folders can be used to enhance the structure of other folders or of projects.

You can link parts, documents, projects transmittals, processes or tasks to your folders.

The link type between folders and documents can be set to either static or dynamic.

Further inofmration on the structuring of PRO.FILE objects can be found in the chapter "Copy and link PRO.FILE Objects".

6.3.4   Duplicate folder

Folders can be duplicated, including the objects in their structure. With this method, in particular folders of the type "Valid template" can be used for the pre-definition of entire structures to be duplicated on demand.

When a folder is duplicated, the following aspects are to be noted:

- Only folders of the type "Standard" or "Valid template" can be duplicated.

- Only the objects directly linked to the duplicated folder are duplicated, too.
  Exception: If a task is linked to a folder and documents are linked to the task, these documents are duplicated as well.

- If a folder is linked to the duplicated folder, it is also duplicated including its sub-structure of directly linked objects.

- If the duplicated folder is configured for quick save, the configuration is duplicated as well.

- Transmittals and processes are ignored when a folder is duplicated.

Proceed as follows

1. Use the PRO.FILE search functions (see chapter "Searching and finding: selecting data records") to display the folder to be duplicated in a list or form.

2. If displayed in a list, select the desired folder.

3. Select the function "**Duplicate**" either from the "Edit" menu ribbon or from the context menu.

⇒ The form for the creation of a new folder is displayed.

4. Enter the information for the description and classification of the folder into the corresponding fields.

5. For the field "Type" see the chapter "Folder types".

6. Confirm your entries with <**Finish**>.

7. All other PRO.FILE objects that are directly linked to the original folder can now be duplicated as well.
For each of these objects, the corresponding check-in wizard is now displayed. For each object you actually want to duplicate, click <**Finish**> in the corresponding checl-in wizard. For each object, you do not want to duplicate, click <**Cancel**> in the corresponding check-in wizard.

⇒ The new folder with the duplicated structure is now displayed in the tab "New folders" and can be used as structure object for further documents, parts and tasks.

6.3.5   Display and manage folders in the favorites bar

Folders can be included in the PRO.FILE favorites bar for quick access.

By double-clicking on the desired folder in the favorites bar, the corresponding folder description is opened in a PRO.FILE tab.
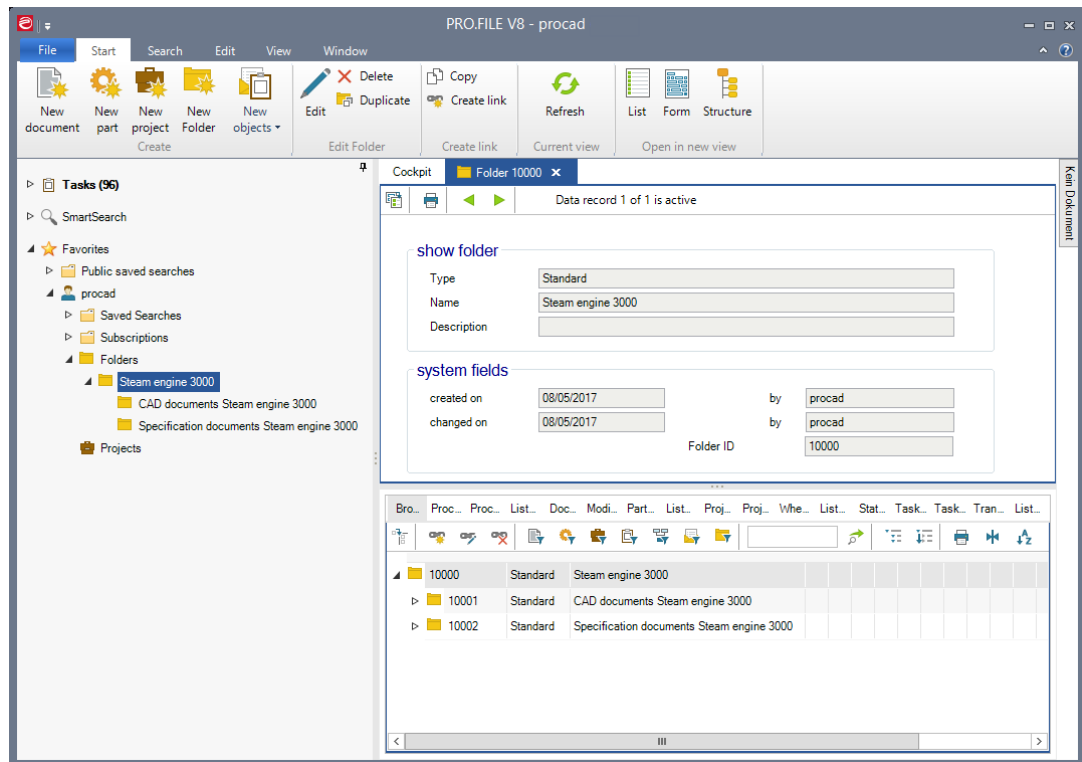
Proceed as follows

1. Use the PRO.FILE search functions (see chapter "<u>Searching and finding: selecting data records</u>") to display the desired folder in a list or form.

2. If displayed in a list, select the desired folder(s).

3. Select the function "**Copy**" either from the "Edit" menu ribbon or from the context menu.

⇒ The selected folder(s) is/are copied to the PRO.FILE clipboard.

4. Select the node "Folders" in the favorites bar.

5. Select the function "**Insert folder**" from the context menu.
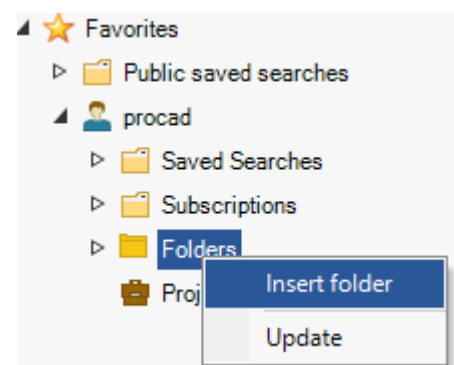
⇒ The folder is now displayed in the favaorites bar.

Note:

If a folder that is linked to the favorites bar contains sub-folders, the sub-structure is now also displayed in the favorites bar.
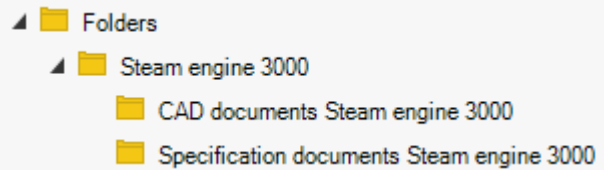
Remove a folder from the favorites bar.

To remove a folder from the favorites bar Proceed as follows

1. Select the folder to be removed in the favorites bar.

Attention:

When the following function is used, the folder is removed immediately from the favorites bar without further inquiry.

2. Select the function "**Remove folder**" from the context mneu.

⇒   The selected folder is no longer displayed in the favorites bar.

⇒   The folder is not deleted and can still be found via the PRO.FILE search functions.
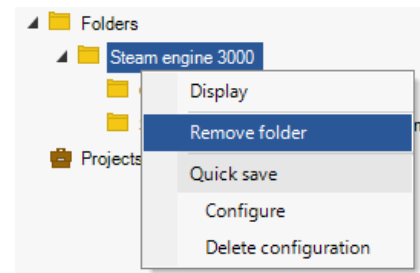
6.3.6   Quick saving of files via drag & drop

Folders can be used for the quick saving of files via drag & drop in PRO.FILE. A new document description is created based on a pre-configured classification that can be configured for each folder individually.

See the following chapter "Configure folders for quick save".

Note:

Folder configured for the quick saving of files in PRO.FILE are displayed in the favorites bar with an upward arrow.
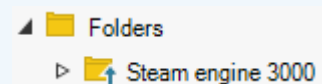
The quick saving via drag & drop is only possible for folders showing this arrow icon.

Proceed as follows

1. Select the file to be saved in Windows Explorer.

2.   Drag the file

- to the desired folder in the PRO.FILE favorites bar

- to a folder displayed in a PRO.FILE form or list tab.
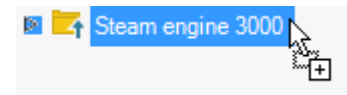
The further steps depend on whether the folder has been configured for quick save with or without check-in wizard (see chapter "Configure folders for quick save").

3A   "Without check-in wizard" the document description is created immediately according to the pre-configured classification and the file is saved.

3B   If the quick saving is not configured without check-in wizard, the check-in wizard is displayed and you can adjust the pre-filled document description.

4.   The file to be saved is attached to the new document description and displayed in a PRO.FILE tab labeled "new documents".

6.3.7   Configure folders for quick save

Folders can be used for the quick saving of files via drag & drop in PRO.FILE as described in the previous chapter.

To be able to use this function, the folder has to be configured with information to be entered into the new document descriptions.

Proceed as follows

1.   Select the folder to be configured either in a list or form display or in the favorites bar.

2.   Select the function "Quick save" => "**Configure**" from the context menu.
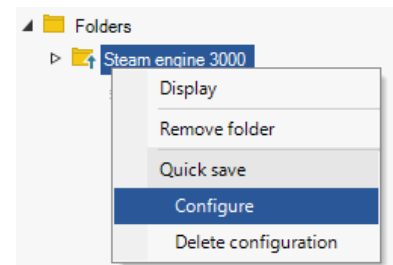
⇒   The window for the quick save configuration is displayed.

⇒   The functionality of this window corresponds to the functionality of a window for the configuration of a SmartSearch.

3.   Select the fields of the document description that are to be filled automatically during the quick save action.

4. Enter the values for the selected fields.

5. Via the checkbox at the bottom, specify whether the check-in wizard is to be displayed for the quick save action.

- If the checkbox is activated, the check-in wizard is displayed during the quick save action and the preconfigured values can be adjusted.

- If the the checkbox is not activatedm the document description is created without further interaction based on the preconfigured information.

6. Confirm your settings with <**Save**>.

⇒ The preconfigured values are now used for the quick saving of files via drag & drop in this folder.

⇒ Folder configured for the quick saving of files in PRO.FILE are displayed in the favorites bar with an upward arrow.
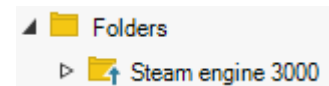
Attention:

In order to use the option "Check-in without check-in wizard", you have to make sure that all required fields (red corner triangle) of the document description are filed with valid values.

If this is not the case, the check-in wizard will be displayed in order for the required fields to be filled manually.

6.3.8   Delete fast-check-in configuration of a folder

Folders can be used for the quick saving of files via drag & drop in PRO.FILE as described in the previous chapter. This configuration can be removed so that the folder is no longer used for quick saving.

> **Attention:**
>
> The deletion of a quick save configuration is made without a confirmation dialog immediately after the function call.

Proceed as follows

1. Select the folder, the quick save configuration of which you want to delete, either in a list or form display or in the favorites bar.

2. Select the function "Quick save" => "**Delete configuration**" from the context menu.

    ⇒   The configuration is deleted without further inquiry.

    ⇒   The icon of the folder is now displayed without upward arrow.
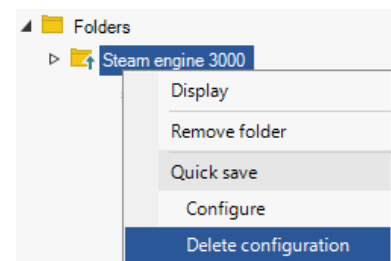
7 Working with documents in PRO.FILE

PRO.FILE unifies the handling of documents, CAD data, Office files, etc. and allows a direct and joint access to these different objects and their listing in a document list.

Function call:

"Edit" => …

The functions in the edit menu of PRO.FILE can either be applied to the document description or to the file attached to this document description.

The functions for editing the document description can be found in the tab "Edit":
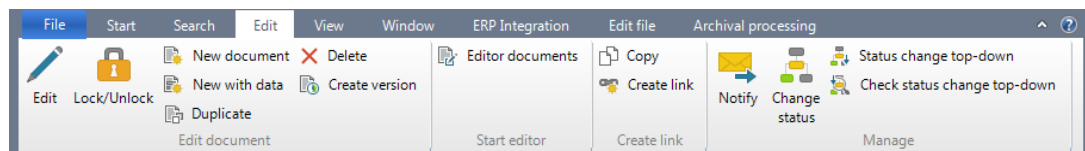
The functions for editing the file attached to a document description can be found in the tab "Edit file":
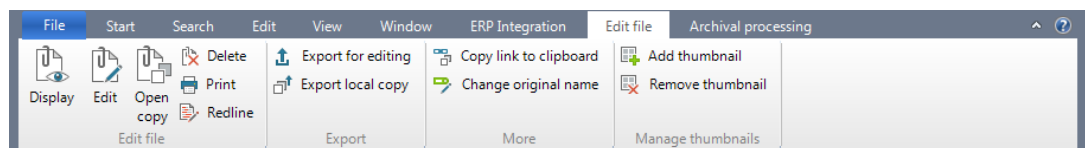
All of these functions can also be accessed via the context menu (right mouse button).

7.1 Create new document description

There are two basic possible preconditions:

Neither parts nor documents have been selected, nor has a document been created:

Function call:

"Start" => "New document "

Documents have already been selected. The system "knows" therefore that the subsequent Edit functions will refer to documents.

Function call:

"Edit" => "New document"

An input form will be displayed that has the same basic setup as the form for the creation of a new part. The setup and layout of a data entry are in the PRO.FILE Management Console. After all required data is entered and the description is confirmed through clicking on 'OK', PRO.FILE will display the stored document description in a new form.

> **Note:**
>
> The start status of a document is dependent on the system configuration of the user, and on the document type.

7.1.1 Save files in PRO.FILE using drag & drop

Drag & drop with the file manager allows to you to save and link files with a simple drag using the mouse. By dragging a selected file from the file manager (Explorer) to the menu bar in the PRO.FILE user interface, you can create a new document description and a link to the object.
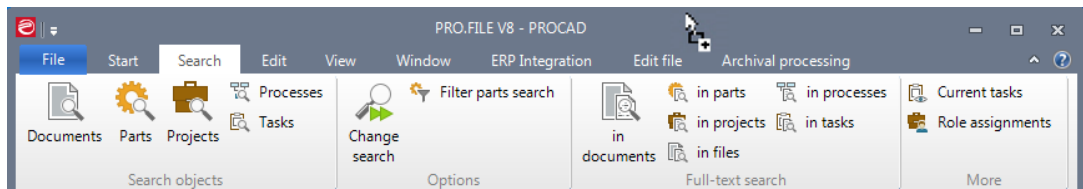
> **Attention:**
>
> The check-in of files using drag & drop will only work if the icon is dragged to the PRO.FILE menu bar. Dragging it to another location within the PRO.FILE interface will be of no result!

In order to save files in PRO.FILE, drag the file that is to be saved to the PRO.FILE menu bar. Once the file is placed there, the PRO.FILE Checkin wizard will appear.

You can now use the Checkin wizard to either create a new document description, adopt the data of an existing document description, or directly attach the file to an existing document description.

The file about to be saved can be seen in the header of the CheckIn Wizard.

7.1.2 Check in files and directly link them

In addition to the check-in of files to PRO.FILE (see chapter "Save files in PRO.FILE using drag & drop") you can directly link the data record that is to be created with an existing data record when saving it.

In order to do so, the document or part with which you want to link the new data record with has to be displayed in the browser view and selected.

Then, using drag & drop, the file that is to be saved is dragged from the Explorer directly to the object selected in the browser view with which you want to link it with.

The new document can then be created as usual. Following the storage assistant, a window will appear in which you are asked to confirm the immediate creation of the link.
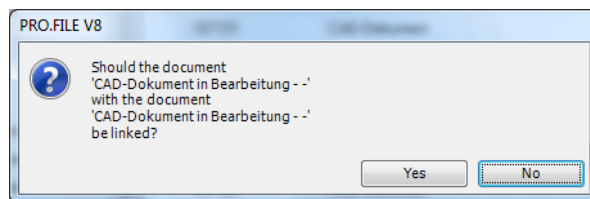
If you confirm this with "Yes", the link to the object that was previously selected in the browser view will be created directly upon creation of the document data record.

7.1.3 Create document description "New with data"

In Menu "Edit" you will find an additional command for creating new document descriptions "**New with data**".

The selected data records can be copied with this command.

A document description is supposed to be activated in the PRO.FILE window. The master records of this document description are already inserted in the new document for creating and can be modified in this mask.

The files relating to the data records will not be copied.

	Function call:
	"Edit" => "New with data"

An insert mask with the already inserted fields corresponding to the previous active document appears. After insertion the document description will be displayed in a form.

	Note:
	The start status of a document is dependent on the system configuration of the user, and on the document type.

7.2   The PRO.FILE Checkin wizard

In order to save files in PRO.FILE, drag the file that is to be saved to the PRO.FILE menu bar. Once the file is placed there, the PRO.FILE storage assistant will appear.

You can now use the storage assistant to either create a new document description, adopt the data of an existing document description, or directly attach the file to an existing document description.

By dragging a selected file from the file manager (Explorer) to the menu bar in the PRO.FILE user interface, you can create a new document description and a link to the object.

The process of saving is carried out in a number of stages. The outcome of each individual stage determines the dialog that will appear for the next stage.

Note:

The description of the processes in connection with PRO.FILE may vary from your actual business situation. This is due to the fact that actions, which are executed after the execution of a command, can be configured differently in PRO.FILE. This particularly applies to the PRO.FILE areas of status administration, part and project assignment, change management and change history.

1. Drag the file from the windows explorer or from the Windows desktop to the menu or icon bar of PRO.FILE
2. Drop the file.
3. The Checkin wizard is displayed supporting you in the saving process.

Saving of new objects in PRO.FILE takes place in two steps:

- [Checkin wizard Step 1: Creation of the document description in PRO.FILE](#)
- [Checkin wizard Step 2: Assignment of the created document to a PRO.FILE project](#)

These steps are described in the following sub-chapters.

7.2.1   Checkin wizard Step 1: Creation of the document description in PRO.FILE

All files saved in PRO.FILE are generally stored under the object type "Document".

In order to save the file now to PRO.FILE, the corresponding document description must be entered to describe and classify the CAD document and to make it available for further usage.

For this, the Checkin wizard for the document description is available:
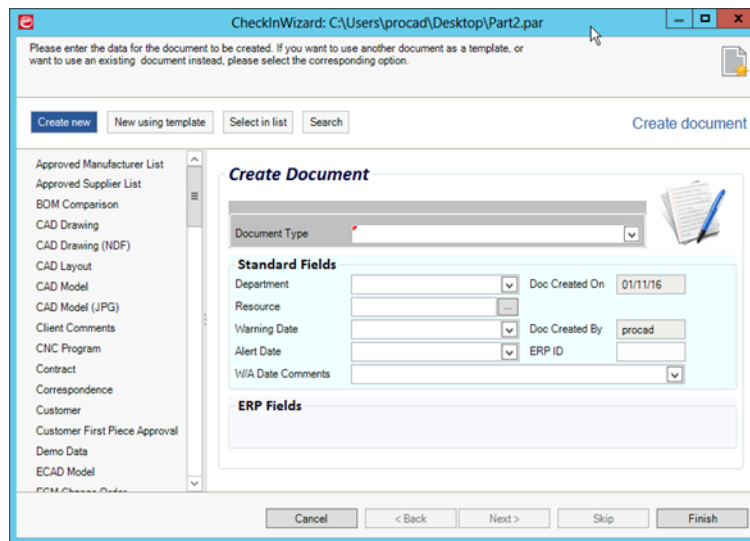
Note: Which file is about to be saved can be seen in the header of the CheckIn Wizard

You can access four options through the buttons in the upper half of the CheckIn Wizard:
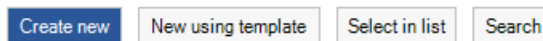
Create new   Create new:

Usage:

- A new document description is to be created.

Proceeding: 1.   Fill in the information for the description of the document.

      ⇒   2. After entering all required document data, confirm the creation of the document description in PRO.FILE with <**Next**>. The new document description is saved.

Select in list   Select in list:

Usage:

- The document to be saved is not to be linked to a new document description but to an existing one.

Proceeding: 1.   Click the option <**Select in list**> to select the desired document description.

      ⇒   The wizard displays the PRO.FILE surface, as it was opened the last time.

      2.   If the document description desired for assignment is not yet displayed in a list or form view, you can use the search functions of the Cockpit, the "Search" menu or favorites and SmartSearch to start a **search**.

      3.   If the document description desired for assignment is displayed in a list view, you can now **select** it. (If the desired document is displayed in form view, it is already selected automatically).

4. Confirm your selection with <**Next**>.

Search Search:

Usage:

- The document to be saved is not to be linked to a new document description but to an existing one.
- The desired document is not yet displayed in PRO.FILE and has to be searched for before assignment of the document description.

Proceeding: 1. Click the option <**Search**> to select the desired document description.

2. Enter the search criteria into the displayed search form and click <**Search**>.

3. Select the desired document record from the list of results.

4. Confirm your selection with <**OK**>.

New using template New using template:

Usage:

- A new document description is to be created for the new document.
- To make the creation of a new document record easier, an existing document record can be used as template with pre-filled fields, which only need to be adjusted.

Proceeding: 1. Click the option <**New using template**> to select the desired document description.

⇒   The wizard displays the PRO.FILE surface, as it was opened the last time.

2. If the document record that is to be used as template is not yet displayed in a list or form view, you can use the search functions of the Cockpit, the "Search" menu or favorites and SmartSearch to start a search.

3. If the document record that is to be used as template is displayed in a list view, you can now select it. (If the desired document record is displayed in form view, it is already selected automatically).

4. Confirm the selection of the document description with <**Next**>.

⇒   The input form for the creation of the document record is pre-filled with the data from the selected part document record.

5. Make the necessary adjustments to the pre-filled data.

6. Once all required document data is entered, confirm the creation of the new document record in PRO.FILE with <**Next**>.

⇒   The new document description is saved.

The Checkin wizard now continues with the options of assigning the newly created objects to a PRO.FILE project.

7.2.2 Checkin wizard Step 2: Assignment of the created document to a PRO.FILE project

In this step the document just saved can be assigned to a specific PRO.FILE project.

Note: Usage of PRO.FILE projects

The third step in the Checkin wizard is intended for the use of PRO.FILE projects. If you are not using PRO.FILE projects, you can skip this step with the option <**Skip**>.

For this project assignment of the newly created document description an existing project must be selected, or a new project must be created.
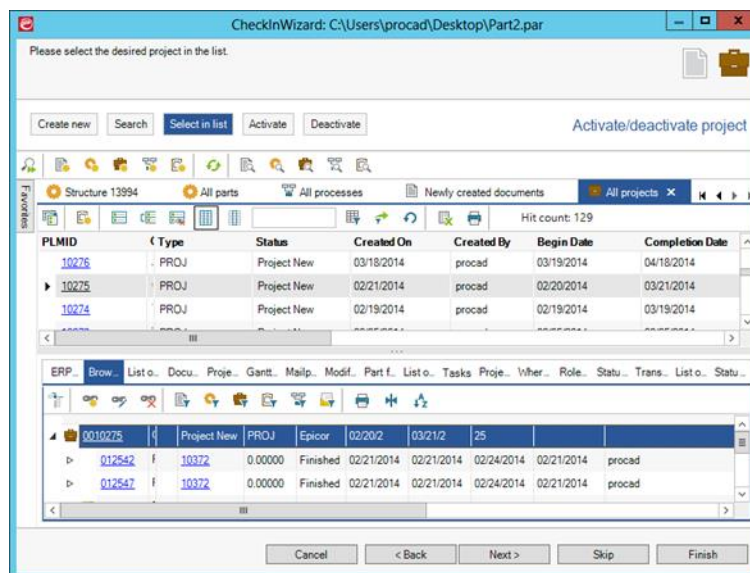
Note: The title bar of the Checkin wizard displays the documents that are currently being handled.
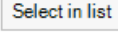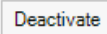
Here, too, the Checkin wizard offers different options that can be accessed via the operations bar:
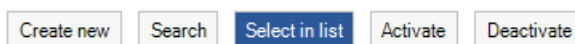
Attention: Project must be activated

In order for a document to be linked to a project, this project must be ACTIVATED. This means that for all of the following options, you have to select the option "Activate" afterwards.

The proceeding for these options is the same as for the first two steps of the Checkin wizard:

- `Create new` Create new:
  A new project is created in PRO.FILE. The document description created in step 1 is assigned to this new project.

- `Search` Search:
  The document description created in step 1 is to be assigned to an existing project. This project is now searched via the search form and selected.

- `Select in list` Select in list:
  The document description created in step 1 is to be assigned to an existing project. This project is already displayed in a PRO.FILE list and only has to be selected and confirmed.

- `Activate` Activate:
  If a project is activated, all new parts and documents in PRO.FILE are automatically assigned to this project. If no project is currently activated, and you want to do so, you can use this function to activate a project.

- `Deactivate` Deactivate
  Again: If a project is activated, all new parts and documents in PRO.FILE are automatically assigned to this project. If this assignment is not to be made for the current document, you can deactivate the project before finalizing the saving process.
  Note: If a project is activated, this is displayed in the title bar of the active PRO.FILE window.

Proceeding:

For the assignment of new documents to a project via the Checkin wizard Proceed as follows

1. Select an existing project or create a new one.

2. Select this project in the list view (project in form view are automatically selected).

3. You now must select "**Activate**". Only if the selected project has been activated, the assignment to the project is made after confirmation.

4. Confirm your proceeding with <**Finish**>.

The saving of the document in PRO.FILE is now finished.

7.3   Opening a document file

The documents saved under PRO.FILE can be created within various applications such as documents from Microsoft Word, or spreadsheets in Microsoft Excel etc.

The menu command "File edit" from the PRO.FILE "Edit"-Menu allows the user to edit a document in its original application.

Function call:

"File edit" => "Document" => …

These commands are available:

- "Display":
  Displays the document in one of the viewer-programs that have been set up for viewing.

- "Edit document":
  Extracts a document from the database for modification.

- "Redline":
  Extracts a document from the database for redlining.

- "Open copy":
  Extracts a copy of the document from the database.

7.3.1 Change documents

When changing documents in PRO.FILE you need to decide:

- Do you want to change the document description? (See chapter "Modify document description").

- Or do you want to edit the attached document? (See chapter "Check out document file for editing ").
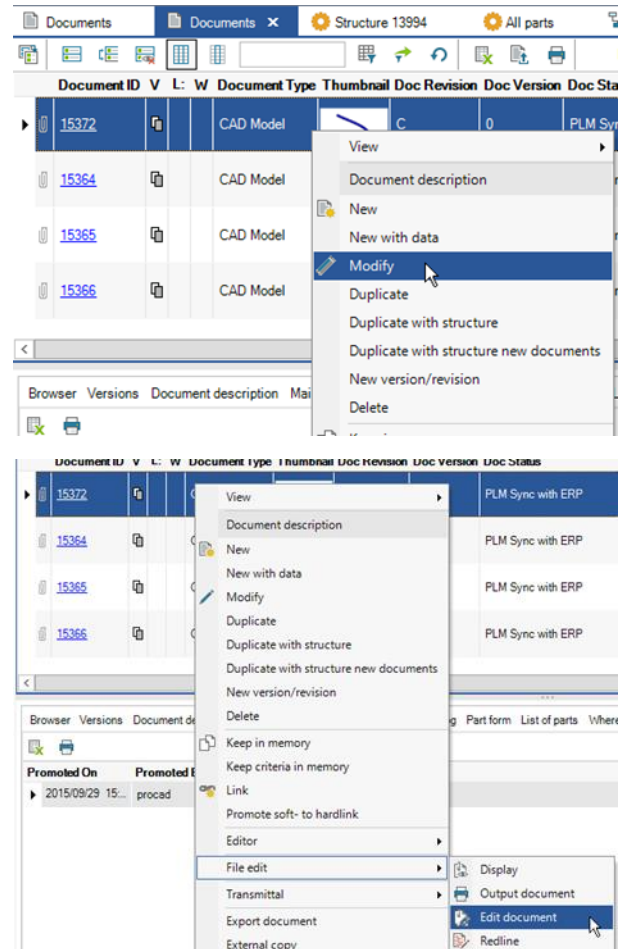
7.3.2 Modify document description

To modify and delete a document, follow the same procedures as for a part.

Function call:

"Edit" => "Edit" and "Edit" => "Delete"

7.3.3   Check out document file for editing

To open a document file for editing, select the function "Edit" from the menu "Edit file" or the button "Edit".

Function call:
"Edit file" => "Edit"

- "Edit":
  Extracts a document from the database for modification.

7.3.4   Note: Change document type

With PRO.FILE a document type can be modified subsequently. The modifying can be made in the modification mask – the field document type is, by default, not locked in this case.

This function can be executed only in the modifying mask for one document, not for several chosen documents.

Modification of a document type initiates the following:

- The variable characteristics related to the old document type will be deleted.
- If a document is saved to a modified document description, it will be copied to the new document description.
- An empty input mask occurs and the new attributes can be inserted in the variable document description.

Note:
Renaming of the document type is not allowed with archived documents.

7.4   Opening and editing a document file

The documents saved under PRO.FILE can be created within various applications such as documents from Microsoft Word, or spreadsheets in Microsoft Excel etc.

The menu "**File edit**" allows the user to edit a document in its original application.

These commands are available:

- "Display":
  Displays the document in one of the viewer-programs that have been set up for viewing.

- "Print":
  Prints the document using the printer that is set up as the standard for the operating system.

- "Edit":
  Extracts a document from the database for modification.

- "Redline":
  Extracts a document from the database for redlining.

- "Open copy ":
  Extracts a copy of the document from the database.

- "Delete":
  Deletes the document permanently (!) from the database.

- "Export for editing"

- "Export local copy"

- "Copy link to Clipboard":
  This function enables you to create an http-link to the file attached to the document master record and copy this link to the Clipboard. In this way the link to the corresponding document e.g. in all office programs, can be taken on.

- "Add Thumbnail":
  A preview picture (a so-called thumbnail) of the document master can be saved to the document, which gives an insight as to what is contained in the document before it is opened. Once this function has been called up, you must select between a "*.jpg" or "*.bmp"-file that will then be used in the list and form views. Additional information can be found in the chapter "[Displaying thumbnails in lists and forms](#)".

- "Remove Thumbnail":
  This function deletes the thumbnail saved to the document master.

Depending on the system configuration, these functions can be launched within respective applications by the operating system or through additional programs.

PRO.FILE will launch the document related application if necessary.

Also, PRO.FILE checks for any possible lock statuses or other limitations in the user rights and statuses.

7.5   Further functions for document management

The PRO.FILE "Edit" menu offers the following further functions for the management of documents:

- [Delete documents](#)
- [New version of documents](#)
- [Status change of documents](#)
- [Export / Import of documents with PRO.FILE (Option)](#)
- [Note: Document management using drag & drop](#)
- [What happens if I exit PRO.FILE while documents are still checked out?](#)

7.5.1   Delete documents

If the document description is deleted, the attached document will be deleted as well.

The Menu function **Edit** => **File Edit** => **Remove document** deletes a document but not its description.

7.5.2   New version of documents

A document can be "frozen" in its current revision. This is done by creating a new revision without having the previous revision updated.

	Function call: "Edit" => "New version/revision"

PRO.FILE creates a new document description and copies the attached files. A reference of this new document description is established to the prior versions/revisions.

- Only the latest revision will be displayed.
- To find out whether there are any old revisions of a document, got to the dependent tab "Versions"
  All previous revisions are listed here.

7.5.3   Status change of documents

Statuses, following the workflow plan, can be assigned to documents; these can then be transferred according to the current document.

Also, a linked part can be in a different status than the related document.

The procedures are for all objects the same, please refer to the chapter: ["Transfer of a document, part or project into another status"](#).

7.5.4   Export / Import of documents with PRO.FILE (Option)

The PRO.FILE-commands "Export document" and "Import document" support companies in forwarding technical documents to the "extended workbench" and guarantees the proper recycling of the documents

When exporting documents from PRO.FILE, the primary data is added to a local export directory where they can be passed on according to the requirements at hand. Due to this functionality, the corresponding data record will remain locked in PRO.FILE until reimport. This avoids the occurrence of competing changes.

All that PRO.FILE requires for the import is the name of the directory in which the exported folder can be found. The data is brought back from there and stored or versioned according to user specifications. Versioning can also be automated for specific statuses. Following the import, the corresponding data records will be unlocked again in PRO.FILE.

Proceed as follows

Simply follow these instructions in order to export documents:

1. In PRO.FILE, open the documents that are to be exported in the list or form view and mark them.

2. Now select the command "Export document" from the PRO.FILE "Edit" menu or from the context menu of the right mouse button.

Function call:

"File Edit" => "Export for editing"

⇒ A directory browser will appear in which you can select the folder to which you want to export the document:
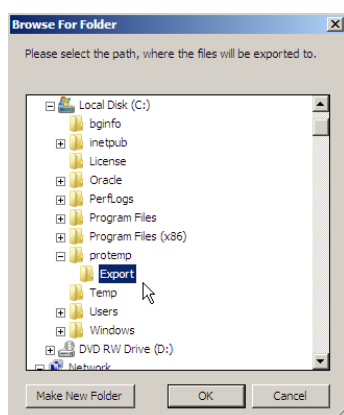
3. A new folder can be created through the <**Make New Folder**> button. In order to do so you have to first select the structure level on which you want to create the new folder.

4. The selected documents will be added to new subdirectories within the selected directory by pressing the <**OK**> button. A modification note will be automatically generated in PRO.FILE and the exported data records will be locked.

A reliable lock and information mechanism will avoid conflicting changes and parallel processing for the duration of the external processing. Corresponding messages will indicate the status of the document if someone tries to retrieve it.

A subdirectory will be created in the selected export directory for each document selected in PRO.FILE. The names that are used for the subdirectories correspond to the PRO.FILE ID numbers of the selected documents.

The exported data can now be retrieved from these directories e.g. by using the Windows explorer and then passed on according to the requirements at hand.

> **Attention:**
>
> The subdirectory that is created according to the PRO.FILE ID upon export (e.g. 10465) must not be renamed! If the directory name is changed PRO.FILE will not be able to find the corresponding data record when importing the data.

Import exported documents back to PRO.FILE

Exported documents from PRO.FILE are saved to a specific directory in which subdirectories are created according to the respective PRO.FILE ID numbers.

If you want to reimport this data, you have to specify a higher-level directory in which the subdirectories can be found according to the PRO.FILE ID number that is to be imported.

The directory selected for the "Import" can be different from the "Export" directory. The subdirectories contained in this "Import" directory, however, have to correspond to the exported directory names.

PRO.FILE imports all data in the subdirectories within the selected import directory and allocates them according to their subdirectory number to the data record with the corresponding PRO.FILE ID number.

Note:

The import feature can only be used for documents that were previously exported from PRO.FILE. A corresponding data record has to already exist in PRO.FILE. Furthermore, this data record has to be locked since the export in order to exclude the possibility of conflicting changes.

If the document that is to be imported is not in already in the database and therefore unknown to PRO.FILE, the import will not be possible. A new document description has to be created and the file has to be checked in to PRO.FILE.

Please follow these instructions in order to import documents that were previously exported from PRO.FILE:

1. Select the command "Import document" from the PRO.FILE "Edit" menu or from the context menu of the right mouse button.

Function call:

"File" => "Import document"

2. A menu will appear in which you have to select the higher-level directory that contains the subdirectories with the files that are to be imported.
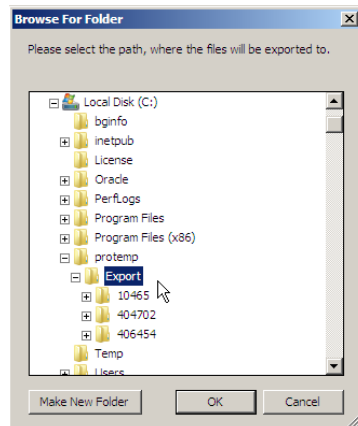
	Note: Please make sure to always select the **higher-level** directory in the structure when importing! This has to be the higher-level directory (e.g. "Export") that contains the subdirectories whose names were generated from the PRO.FILE ID numbers upon export and which, in turn, contain the files that are to be imported. An import can only be done by stating the higher-level directory in which PRO.FILE will then find the exported subdirectories. If you directly select a document directory (e.g. 10465), an error message will be returned.

Once the respective directory was selected, it will be executed by clicking <**OK**>.

- If the subdirectories contained in the selected directory were previously exported from PRO.FILE, the contained documents will be imported back to the database. You can select the type of import from the window that appears:

  - If you select <**Overwrite**>, the imported data will be saved under the existing document description from which the data were exported. Existing documents will always be overwritten.

  - If you select <**Versioning**>, a version of the imported data will be stored for the existing document description from which the data were exported.

  - If you select <**Automatically**>, the status will determine whether the imported document will overwrite or version the existing document. If the option "Automatic versioning" is set for the workflow status in which the document master data are currently in, these document master record will be versioned upon this selection. If this status is not set for the current workflow status of the document master data, they will be overwritten.

⇒ The documents in these subdirectories will be allocated to the data records in PRO.FILE according to the number given in the name of the subdirectories and then imported.

⇒ The data records of the reimported documents in PRO.FILE will be unlocked. You can now work on them again and apply changes. This completes the import.

Attention:

All subdirectories with a PRO.FILE ID name and their related documents that are contained in the selected directory will be imported back to PRO.FILE and then unlocked upon import!

Tip: re-import of modified documents only

When importing data that were previously exported from PRO.FILE, all subdirectories with ID names in the selected directory will be taken into account and the contained documents will be imported.

However, you can freely select the directory from which you want to realize the import.

In addition to the export directory, you can create an import directory from which you can realize the import of data into PRO.FILE.

This is illustrated by the following example: In this example, the data from PRO.FILE is exported to the "Export" directory. The reimport back to PRO.FILE, however, is realized from the "Import" directory.

This allows you to move data and the related folder (in this example "406454") into the "Import" directory once you have completed your work on them. This ensures that only modified documents are reimported back to PRO.FILE when you select this "Import" folder.
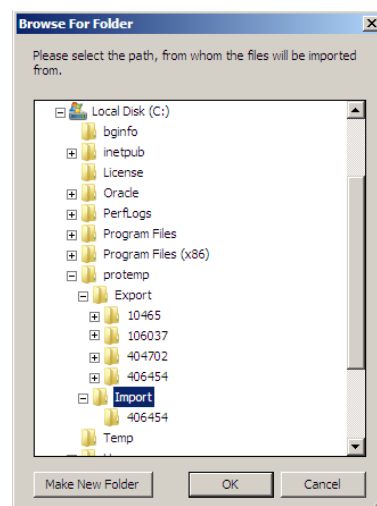
Attention:

Please note that you can move the directories that were created in the export directory upon export but that you must not rename them. You also have to make sure that the right data is placed in the right directory:
PRO.FILE will allocate the files in the subdirectory to the corresponding document master records, based on the document IDs that are used as folder names.

7.6   Note: Document management using drag & drop

Drag & drop in PRO.FILE allows you to create, retrieve, or link documents and parts by dragging an object with the mouse.

Note:

Drag & drop describes the Windows functionality that allows you to move files within the Windows user interface using the mouse and graphical visualization. In order to do this, the object that is to be moved is selected with the mouse pointer. By pressing and holding the left mouse button, the selected object can now be "dragged" to the desired location (e.g. the PRO.FILE menu bar). Once the mouse button is released, the object will be pasted to the new location in the active program.

The following subchapters will give you an overview of the different drag & drop possibilities:

- Save files in PRO.FILE using drag & drop
- Check in files and directly link them
- Retrieve files as a copy using drag & drop
- Display documents in MS Excel or MS Word using drag & drop
- Save entire folders
- Drag & Drop from the documents list
- Drag & Drop from the Parts List
- Drag & Drop with the Bill of Material Editor

7.6.1   Retrieve files as a copy using drag & drop

PRO.FILE gives you the possibility to directly retrieve files as a copy using drag & drop. Simply follow these steps:

1. Select the document that you want to retrieve as a copy in PRO.FILE and display it in the **list view**.

2. Start the Windows Explorer and select the directory where you want to place the copy.

3. Go back to the PRO.FILE user interface.

4. Press and hold the <**Ctrl**> key to start the drag & drop function. At the same time, click the first column with the 📎 icon in the PRO.FILE list. Now drag the selected lines to the desired directory without releasing the mouse button.

5. Do not release the mouse button and the <**Ctrl**> key before the Windows paste icon appears here. The data is then pasted to the desired location.

> **Note:**
>
> In order for this drag & drop functionality not to be executed accidentally when marking data records and to avoid unwanted data movement, it can only be executed via the first column of the PRO.FILE document list.
>
> The drag & drop to the Windows Explorer can only be initiated when the mouse pointer is placed in this first column with the 📎 icon and the <Ctrl> button is held down.

7.6.2   Display documents in MS Excel or MS Word using drag & drop

Documents can be directly transferred to Microsoft Excel or Microsoft Word using drag & drop. This is done using a copy; the data record will not be locked in PRO.FILE!

Simply follow these steps:

1. Select the document that you want to retrieve in PRO.FILE and display it in the **list view**.

2. Press and hold the <Ctrl> key to start the drag & drop function. At the same time, click the first column with the 📎 icon in the PRO.FILE list. Then drag the marked lines to the **header** of the MS Excel or MS Word interface.

3. Do not release the mouse button and the <Ctrl> key before the Windows paste icon appears here. The file that belongs to the documents data record will now be opened here.

> **Note:**
>
> In order for this drag & drop functionality not to be executed accidentally when marking data records and to avoid unwanted data movement, it can only be executed via the first column of the PRO.FILE document list.
>
> The drag & drop to the Windows Explorer can only be initiated when the mouse pointer is placed in this first column with the 📎 icon and the <Ctrl> button is held down.

7.6.3   Save entire folders

PRO.FILE allows users to save entire folders in the database.

In order to do so, move the directory from the Windows Explorer or any other file manager to the menu bar of the PRO.FILE user interface using drag & drop.

> **Attention:**
>
> Directories can only be checked using drag & drop if the icon is dragged to the PRO.FILE menu bar. Dragging it to any other area of the PRO.FILE interface will not yield any results!

PRO.FILE is activated and creates a data record for this directory via the CheckIn Wizard. Saving can be made as usual by selecting the document type and inserting the PRO.FILE document description.

By checking out the directory from the database the complete directory will be created locally. The user has the possibility to select a file in the browser. The relevant application is then started.

With termination of the application the complete directory will be saved.

7.6.4 Drag & Drop from the documents list

Using Drag & Drop from Documents List enables the documents to be linked with objects in the browser. Once the active document description is dragged into the browser, a link is established with the objects shown by the browser.

7.6.5 Drag & Drop from the Parts List

Using Drag & Drop from the Parts List is identical to using Drag & Drop from the documents list.

7.6.6 Drag & Drop with the Bill of Material Editor

Via Drag & Drop you can copy or move positions in the bill of materials editor:

- Move single BOM position:

- Copy single BOM position (hold CTRL key):

- Move several BOM positions:

- Copy several BOM positions (hold CTRL key):
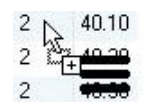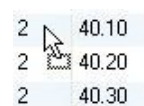
7.6.7   Drag & Drop for the transfer of PRO.FILE data to MS Excel

You can export selected lines of a PRO.FILE list to MS Excel via drag&drop. The selected data is then also displayed in a table there.

To use this function, select the desired lines within a list in PRO.FILE.

You can then click on the first column (which displays the 🔗 icon or is empty) of your selection and then drag the selection to the MS Excel GUI. As soon as your mouse pointer shows the Windows insertion symbol, you can drop the selection. The data is now inserted into Excel.

7.6.8   Combined documents

 In most companies there are firm relations between document types, which should be displayed in PRO.FILE. That means that documents cannot only be selected by their own document type, they can be selected by the characteristics of the relating document type, too.

Example: A customer placed an order, and to this order exists an invoice (this invoice is also related to the customer). A document type "customer" is defined, and to this a subordinated document type "invoice". The document type "invoice" is a related document type of "customer".

There are two separated data records which are related to each other.

While creating a new data record "customer" with the command "New", a second combination-mask including characteristics of "customer" and "invoice" is displayed. One fills both, two data records with which the data record "invoice" is associated with the data record "Customer" automatically are created, as recognizable also in the browser representation.

If one fills only the fields of the first document model, no data record of the combined document model is created.

Searching for combined document types

If, for example, you want to search for a specific invoice from a customer, the function "Search" => "Documents" opens a combined mask. This combined mask contains the features of the first (superior) document type - in this case "Customer" - in the upper part, and in the lower part the features of the combined document type, in this case " invoice".

If you enter search criteria in the two parts of the mask, the two desired data records are searched and displayed.

"New with data" with combined document types

This command is only available if a data record of the super ordinate document model is represented in the acting window and is selected.

If the command is chosen, a multi-purpose mask that is filled already with the dates of the acting super ordinate data record appears. The fields of the combined data type are not filled since a new data record of the document model is supposed to be created.

In our example the fields of "Customer" are filled already, that from "Bill" still not. Now new "invoice"-Data will be entered without the "customer" dates being changed, an "invoice"-Data record that is associated with the available "customer" data record is created.

If also the "customer"-data are changed, also a new "customer" data record which is associated with the new "Bill"-data record is created.

7.7 Optional: Save encrypted files from Boxcryptor in PRO.FILE

PRO.FILE supports the saving of encrypted files using the software solution Boxcryptor: Files encrypted with Boxcryptor can be saved to PRO.FILE, opened by authorized users and be saved back with encryption.

> **Prerequisite: Business license of Boxcryptor**
>
> For the usage oft he Boxcryptor encryption in connection with Pro.FILE, the Business License of Boxcryptor is required.

This chapter describes the proceeding for working with encrypted files in PRO.FILE in the following sub-chapters:

*   [The configuration settings for Boxcryptor at your computer](#)
*   [Initial saving of encrypted files in PRO.FILE](#)
*   [Change encrypted files from PRO.FILE](#)

Limitation of the usage options of PRO.FILE functions:

When files encrypted with Boxcryptor are saved to PRO.FILE, the following limitations apply:

*   Due to the complex structures and references of CAD documents, the encryption is not supported by the PRO.FILE CAD integraitons.
*   OLE links within Office documents cannot be supported for the storage of encrypted files in PRO.FILE.
*   It is not possible to create NDF files from encrypted files in PRO.FILE.
*   Zipped files (folders, redline files) are not saved with encryption.

7.7.1 The configuration settings for Boxcryptor at your computer

To be able to save encrypted files in PRO.FILE, the encryption with Boxcrypter has to be configured on your computer. This includes the following:

*   Boxcryptor with Business license has to be installed on your computer.

- The Windows user folder (%USERPROFILE%) has to contain a folder named "PRO.FILE".

- This folder "PRO.FILE" is acced to the Boxcryptor configuration as storage location.

- The folder is thus displayed as a virtual drive, e.g. P:\PRO.FILE.
  The initial saving and intermediate saving of files is then made via this folder.

7.7.2   Initial saving of encrypted files in PRO.FILE

To save an encrypted file for the first time in PRO.FILE, this file has to be encrypted by Boxcrypter before the saving PRO.FILE in PRO.FILE.

Encrypted files can be saved from the Boxcryptor folder (e.g. P:\PRO.FILE) via drag&drop in PRO.FILE. This is described in the chapter "Save files in PRO.FILE using drag & drop".

Note:

For the encryption via Boxcryptor, the file has to be saved locally in the Boxcryptor folder. Since this is the only way the encryption can be made, a direct saving to PRO.FILE without saving to the Boxcryptor folder first is not possible. Encrypted files can only be saved in PRO.FILE via drag&drop.

The saving of folders in PRO.FILE

When encrypted folders are saved, the following applies:

- When folders are saved to PRO.FILE, the folder itself is not encrypted.

- The files in that folder have to be encrypted by the user currently logged in to Boxcryptor.

- When a folder with encrypted Boxcrypter *.bc files is saved in Pro.FILE, this folder is displayed in the Windows Explorer when extracted from PRO.FILE.

Note:

The Boxcryptor option for the encryption of file names must not be used, since PRO.FILE can otherwise not detect the file in the virtual drive.

7.7.3   Change encrypted files from PRO.FILE

> **Note:**
>
> The changing of encrypted files from PRO.FILE and the encrypted saving back to PRO.FILE requires Boxcrypter to be installed on the user computer and the storage folder for PRO.FILE being configured in Boxcryptor (see chapter "The configuration settings for Boxcryptor at your computer").

If an encrypted file is saved in PRO.FILE it can be edited and saved back with the normal PRO.FILE functions. The file thus remains saved and encrypted in PRO.FILE.

- The encryption is made automatically by Boxcryptor during the saving back of the changed file to PRO.FILE.

- A saving via drag&drop as during the initial saving oft he file to PRO.FILE is not required.

During the saving process of the changed file in PRO.FILE, the encryption with Boxcryptor is made in the background. Depending on the file size, the saving process may take a little longer.

ATTENTION: Versions of encrypted files

When new files are to be saved for the first time with encryption to PRO.FILEm these have to be encrypted by Boxcryptor before. Therefore, the following has to be noted for the handling of versions:

- When a version of an encrypted file is created in PRO.FILE via the "Create cersion" function of the PRO.FILE Windows Client, the new version of the file is encrypted as well.

- When an encrypte file is opened from Pro.FILE and then a new version is created via a PRO.FILE Office integration, the new version of the file is NOT yet encrypted.

Working with encrypted files and the Office integration

The encryption of files for the saving in PRO.FILE is made by Boxcryptor. New files always have to be encrypted by Boxcryptor first before they are saved to PRO.FILE.

As a consequence, new files that are created from already encrypted files via the functions "New from template" and "Version" of the PRO.FILE integrations but not yet encrypted by Boxcryptor are saved without encryption when saved directly to PRO.FILE.

This has the following reason:

When document versions are created via the PRO.FILE Office integrations, the new version is saved by Office as new file on the computer. If this new file is then directly saved in PRO.FILE via the Office integrations, the file has then not yet been encrypted by Boxcryptor. The new version of the file is thus saved to PRO.FILE without encryption. Therefore, when document versions are created via the PRO.FILE integrations, you also have to go via the Boxcrypter folder – this also applies to documents created with the function "New from template".

- Encrypt the new file created via "Version" or "New from template" locally with Boxcryptor.

- Save this file via drag&drop from the Boxcrypterfolder (e.g. P:\Boxcryptor) in PRO.FILE as described in the chapter "Initial saving of encrypted files in PRO.FILE".

7.8 What happens if I exit PRO.FILE while documents are still checked out?

If documents are checked out for editing, a lock flag is set for the corresponding documents.

If PRO.FILE is then closed without the opened documents having been saved back, PRO.FILE needs to know what is to happen to the open documents.

For this reason, a message "**The object is checked out and changes are not yet stored in PRO.FILE**" informs the user of this.

The lower part of the window offers you several options of proceeding:
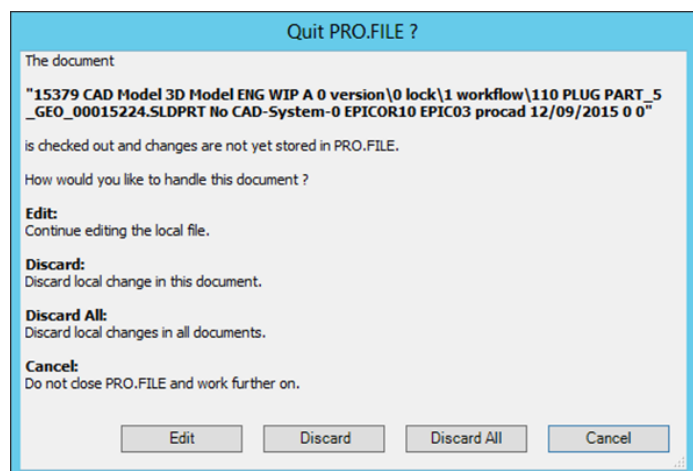
- Edit
  PRO.FILE switches to the application the document is edited with. PRO.FILE is not closed.

- Discard
  The document is unlocked in PRO.FILE. Changes made since the last saving are discarded. If additional documents are still opened from PRO.FILE, they are also displayed in this window. If no further documents are opened, PRO.FILE is closed.

Attention: loss of data

If a document is unlocked with this function and the changes are discarded, only the status that was last saved to PRO.FILE remains. Recent changes that were not saved back to PRO.FILE are lost!

- Discard all
  If several documents are opened from PRO.FILE, they can all be unlocked at once, and the changes to any of the documents are discarded. The documents are not displayed individually. PRO.FILE is closed.

> **Attention: loss of data**
>
> If a document is unlocked with this function and the changes are discarded, only the status that was last saved to PRO.FILE remains. Recent changes that were not saved back to PRO.FILE are lost! Especially, when you have several documents opened, you should use this function with care!

- Cancel
  The closing process is aborted. The PRO.FILE session remains open.

8   Working with parts in PRO.FILE

When parts have been searched in PRO.FILE, the results are displayed in form or list display.

If a part description is selected, the "Edit" menu and the context menu contain various functions specifically for the working with parts:

Part
New
Modify
Duplicate
New version/revision
Delete
Copy
Copy search criterion
Copy node data
Create link
BOM editor
Editor
Lock/unlock
Change status
Status change top-down
Check status change top-down
Notify
Seen and approved
Seen and rejected
Keep in memory for Pocket
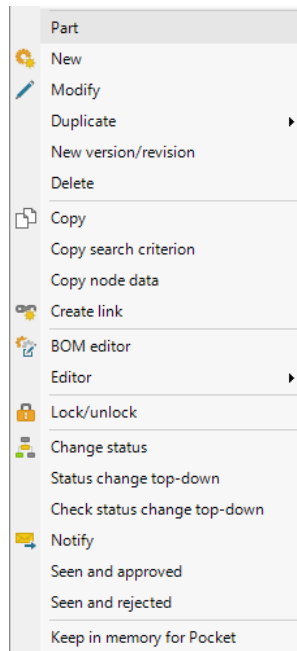
- **New**: Creates a new part description. See chapter "Create new part".

- **Modify**: Opens an existing part description in editing mode. The description can be changed and saved, provided that the user has the required permissions. See chapter "Modify part".

- **Duplicate**: Functions for the creation of duplicates of a part description with different options for the handling of related objects. See chapter "Duplication of parts".

- **New version/revision**: Function for the versioning of bills o materials – if the BOM versioning is used.

- **Delete**: Deletes a part description from PRO.FILE, provided that the user has the required permissions. See chapter "Delete part".

- **Copy**: Puts the part description into the PRO.FILE clipboard. The part can then be attached to another PRO.FILE object or, via the bill of materials editor, to a bill of materials. See chapter "Copy part master data".

- **Copy search criterion**: Copies the search criteria, via which the part was found, to the PRO.FILE clipboard.

- **Copy node data:** Function for the copying of entire bill of material nodes. See chapter "Copy node data".

- **Create link**: Uses the object from the PRO.FILE clipboard to link it to the selected part.

- **BOM editor**: Creation, administration and editing of bills of materials and BOM positions. See chapter "Parts: working with the Bill of Materials".

- **Lock/Unlock**: Functions for locking or unlocking a part descriptions in order to prevent a part from being edited by other users.

- **Status change / Notify / Seen and approved/rejected**: Functions for the status administration of part descriptions. The usage for part descriptions corresponds to the usage of these functions for document descriptions. See chapter "PRO.FILE status management: Support and Control your Workflow".

- Keep in memory for Pocket: Function for the optional tool "PRO.FILE Pocket". See operation manual for PRO.FILE Pocket.

8.1   Create new part

This command creates a new part in the database i.e. the part is described by the master data.

Function call:

"Start" => "New part" or "Edit" => "New part"

Filling in the data entry is made faster and easier by using the selection functions. If these are available, this is indicated by the selection button at the end of a field.

If a key characteristics list was created for a product group it will appear in the left column of the mask or in the corresponding items class field following the respective selection.

This is where you can enter product group-specific characteristics.

Once all entries were completed the part window will appear in which all entries are displayed.

If an items class list was selected the key characteristics list that belongs to the part will also be displayed.

8.2   Modify part

Parts which are locked by another user cannot be modified. Certain parts automatically assigned by the system, such as the database number, the part number, the designer and the creation date cannot be modified either.

Function call:

"Edit" => "Modify"

If the selected part is used in an assembly, the parts usage window appears, as well as a message which has to be confirmed.
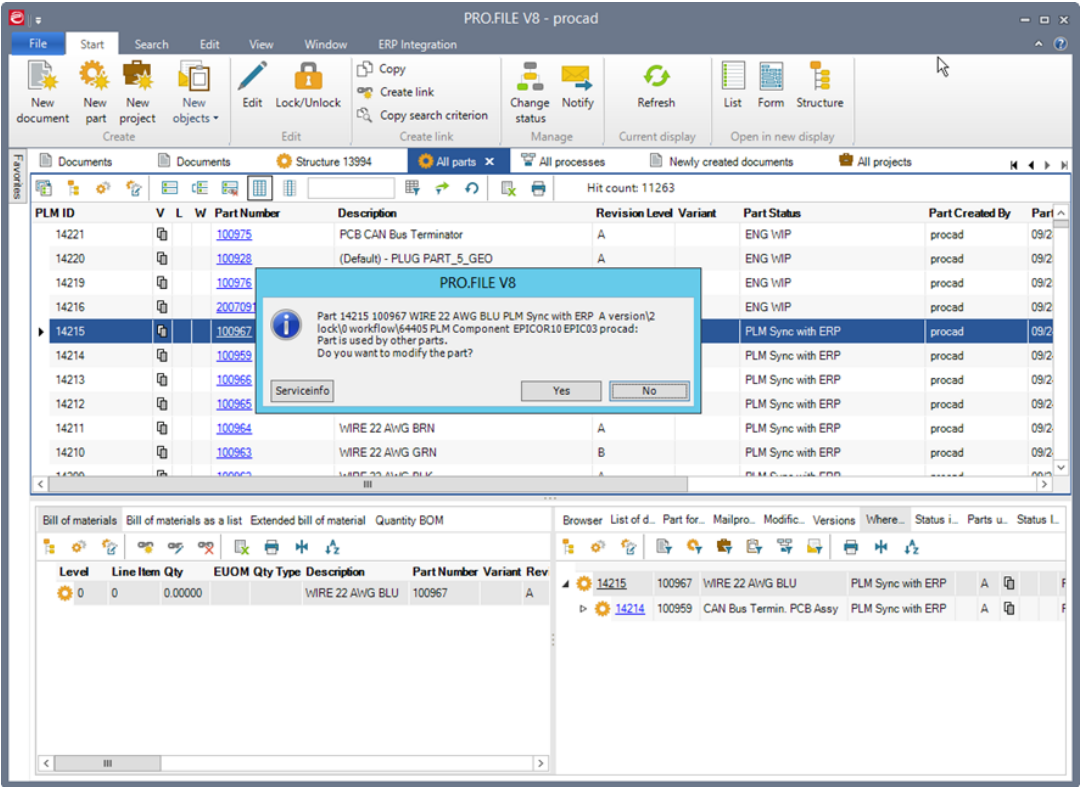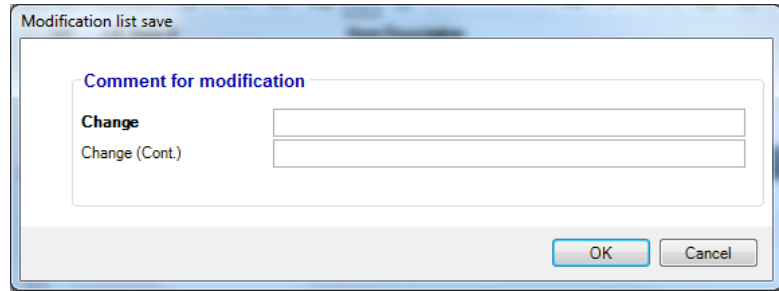
The data entry form will be filled in according to the new entries when the part is modified.

If there is a specifications table for a specific product group, it will be displayed in order to be modified.

If modifications are made to the first level of the item class, all other characteristics of the item class are deleted.

<OK> is used to confirm the entry and, if necessary, open the specifications table to gather information specific to the product.

The next confirmation opens the modification log mask, in which notes for the modification log are entered

An entry is not necessarily compulsory (depending on the configuration), but is recommended. A thorough documentation of all changes provides a comprehensible "history" of the development of the product.

8.3   Delete part

This command deletes a part from the database.
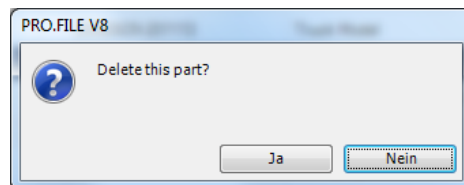
Function call:

"Edit" => "Delete"

If CAD data was saved for a part, it is impossible to delete the part within PRO.FILE. All CAD data belonging to a particular part must be deleted in the originating CAD system before the part can be removed.

If PRO.FILE is called from the CAD system, a part with CAD data can be deleted if the CAD data is originated in the same CAD system.

Before the deletion is carried out, a query must be confirmed as a precaution.

If a part is built into one or more assemblies, a message window appears as well as a parts usage list with all assemblies where the part is currently used.

Here you can check on whether deletion is permitted and what objects will be effected. (see **Modify**)
If one or more assemblies are deleted, the individual single parts built into them will **not** be removed from the database.

8.4   Duplication of parts

PRO.FILE offers several possibilities for the duplication of parts, such as with the bound documents of the duplicated parts and also the bills of materials that are to be taken on by the new duplicated part.

The various functions that are available can be activated from the "Edit"-menu using the menu point "Duplicate" then the function required from the list that appears, when the part form or the part list is active.

Function call:

"Edit" => "Duplicate"

For the various functions in this menu please see the following chapters:
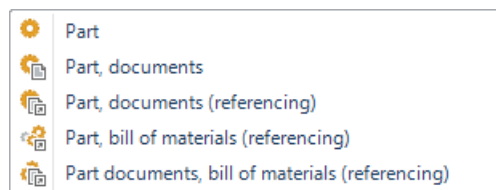
⚙ Part	• Duplicate part only
Part, documents	• Duplicate part with documents
Part, documents (referencing)	• Duplicate part with referencing of the existing documents
Part, bill of materials (referencing)	• Reference part with bill of materials
Part documents, bill of materials (referencing)	• Duplicate part with bill of materials and documents

Duplicate part only

Function call:

"Edit" => "Duplicate" => "Part"

If when duplicating a part, only the part is to be duplicated, and not the attached documents, it can be done in the following way:

• The function "Duplicate" => "part" is called up.

The part is now duplicated. In this way, neither the attached documents nor the bill of materials will be taken on.

Duplicate part with documents

Parts can be duplicated so that the part description is changed as well. This is very useful when creating similar parts that are only very slightly different.

Function call:

"Edit" => "Duplicate" => "Part, Documents"

The part that is to be duplicated should be highlighted, or activated in the display. After selecting the function "Edit" => "Duplicate" => "Part, Documents", the entry window will appear in which the desired changes can be entered.

If the product group is attached to a characteristic bar, this will also be offered to be changed.

The entered changed data is then confirmed with Next.

Several system messages (information) will then be given, to assist the copying process.

With the function "Duplicate part with documents"; the document that is attached to the part will be copied as well. The following points should be noted:

As a rule, PRO.FILE will try to duplicate all attached documents. Depending on the saving mechanism of your CAD-system, it is not always possibke to duplicate all attached documents. However, these documents can be copied when PRO.FILE is accessed from within the CAD-system.

Note:

When duplicating parts only the attached documents that the user has the authority to see will be copied.

Duplicate part with referencing of the existing documents

Function call:

"Edit" => "Duplicate" => "Part, Documents (referencing)"

If when duplicating a part, the attached documents are not also to be copied but referenced instead, the process is done in the following way:

- The function "Part, Documents (referencing)" is called up.

- The duplicate part is created.

- The documents are then attached.

The part is now duplicated. The attached documents are not copied; the new part refers to the existing documents.

Reference part with bill of materials

Function call:

"Edit" => "Duplicate" => "Part, BOM (referencing)"

The duplication of the part master record with the bill of materials is carried out here, although it is done without the attached documents being duplicated. The assigned bill of materials is then referenced, and placed together with the copied assembly part master record, without the affected parts being copied.

The documents attached to the part are not copied.

Duplicate part with bill of materials and documents

Function call:

"Edit" => "Duplicate" => "Part, Documents, BOM (referencing)"

The duplication of the assembly part master record is carried out here. The assigned bills of materials are referenced, placed together with the copied assembly part master record, without the affected parts to be copied.

The documents attached to the part are copied too.

Note:

When duplicating parts, only the attached documents that the user has the authority to view will be taken on.

8.5   Copy part master data

Function call:
"Edit" => "Copy"

"Copy" sends data to the PRO.FILE clipboard (similar to that in MS Windows). However, you are not able to paste information from the PRO.FILE clipboard into other Windows Applications.

This function is particularly useful for editing BOMs but also when linking data records, etc.

8.6   Copy node data

Function call:
"Edit" => "Copy node data"

With this function bill of materials can be copied. With the function "Copy node data" Bill of materials are memorized. With the function "Create link" it will examine whether the part has already a BOM:

- If it has a BOM, nothing is copied.
- If the part does not have any BOM, the copied nodes with all values are attached to the new part.

8.7   Parts: working with the Bill of Materials

An assembly can consist of parts of the same or of a different product type or of several subassemblies.

Bill of materials which can be divided up into overviews and parts' usage verification, are created to manage the hierarchical structure. (See menu View).

The data which determine the position of the part in the hierarchy are managed separately from the assembly part and are allocated to it.

Function call:
"Edit" => "BOM Editor"

Bill of Materials creation process

These functions can also be performed using the **Drag & Drop** function under Microsoft Windows (Cf. Drag & Drop section under Microsoft Windows).

The function Copy copies a selected object to the PRO.FILE clipboard.
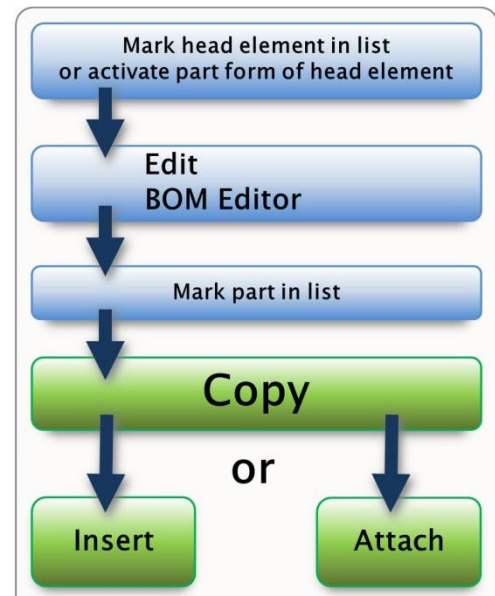
These functions can also be performed using the **Drag & Drop** function under Microsoft Windows (Cf. Drag & Drop section under Microsoft Windows).

The function **Copy** copies a selected object to the PRO.FILE clipboard.

8.7.1 Add positions to the bill of materials

To add positions to the bill of materials:

- select the part in PRO.FILE that is to be the mother part of the BOM, and

- select the function "**Editor bill of materials**" from the "**Edit**" menu.

In the BOM editor, different functions are available to add new positions to the BOM.

The functions differ in the method of selecting the parts to be included in the BOM:

- The functions "**Insert**" and "**Attach**" add parts that have been memorized by the PRO.FILE clipboard.

- The functions "**Fast Insert**" and "**Fast Attach**" offer a search form to select the desired parts from a list to include them in the BOM.
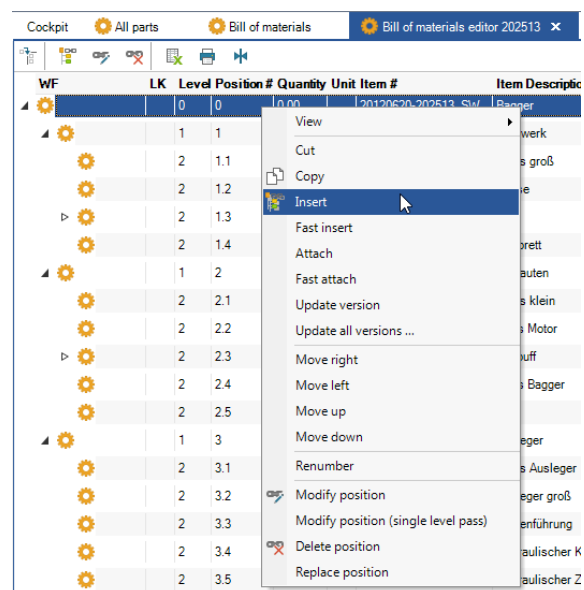
To handle a part memorized in the PRO.FILE clipboards you can use:

- **Insert:**
  The part is inserted into the BOM at the same hierarchical level as the selected BOM position.

or

- **Append:**
  the part is appended to the active part one level below the selected BOM position.

The functions "Fast Insert" and "Fast Attach" are used to quickly add several parts to the BOM. If one of these functions is selected, a search form is opened. The results of the search are presented in a list, from which you can select the desired parts to be added.

The difference of the two functions is again the level, on which the new parts are added.

	Note:
	If an assembly from the PRO.FILE clipboard is to be added to a BOM that already exists on a higher level, an error message is displayed, since this would mean that the part is used in itself.

The procedure for the functions "Fast Insert" and "Fast Attach" is as follows:

- Select the position in the BOM, where you want to insert or attach a new part.

- Select the function "Fast Insert" or "Fast Attach" from the context menu.

1. A search form for parts is displayed:
   Enter the desired search criteria and start the search.

2. From the list of search results select the parts that you want to add to the BOM. You can use the <CTRL> or <SHIFT> key to select several records.
   Confirm your selection with <OK>.

3. All selected parts are now inserted (or attached) in the BOM. For each selected part, the entry form for the BOM positions is displayed. The title bar of the entry form displays the part currently handled.
   Confirm your entries with <OK>.

The search for parts, as described in step 1, is then restarted to add further parts according to your search criteria. As long as you want to add further parts, you can go through the cycle over and over again.

If you do not want to add further parts, click on <Cancel> in step 1. The function "**Fast Insert**" or "**Fast Attach**" is then closed.

8.7.2   Indenting, outdenting, moving up and down

This function moves a selected part within the hierarchical structure.

Function call:

Tab "**Edit**" => Group "**Change position**" "**Move right**",
Tab "**Edit**" => Group "**Change position**" "**Move left**",
Tab "**Edit**" => Group "**Change position**" "**Move up**",
Tab "**Edit**" => Group "**Change position**" "**Move down**",
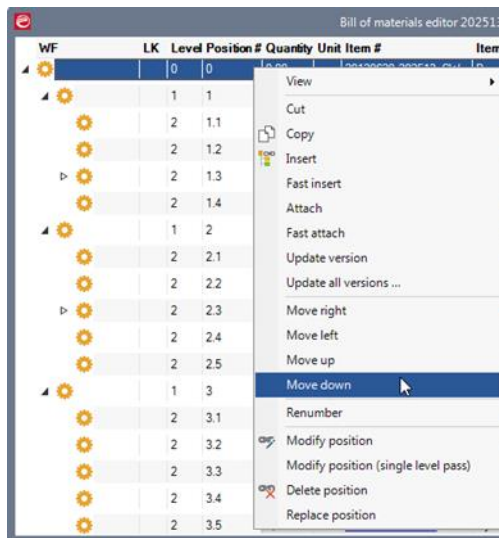
Before the function is carried out the list of modifications is displayed. If a part whose root element comprises of further assemblies is to be indented or outdented, all parts "under" it will also be indented or reverse-indented. The position number indicates what belongs to which root elements.

Position number:

The individual positions within the hierarchy levels are separated by a dot and generally listed by tens, although this is adjustable.

If a part is already in the first or last hierarchy level, it cannot be indented or outdented, and an error message will be displayed.
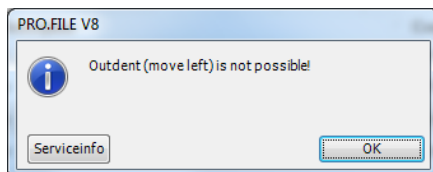
8.7.3   Numbering

This command can only be used with a building block BOM; the switch to the building block BOM occurs automatically.

Function call:

Tab "**Edit**" => Group "**Change position**" => "Renumber"

Renumbering single level bill of material of 14214 100959 CAN Bus Termin. PCB Assy PLM S...

Level	Line Item	Qty	EUOM (	Description	Part Number
▶ 1	10	1.00000	EA	PCB CAN Bus Terminator	100960
1	20	6.00000	EA	CONTACT SOCKET-BACC47EG-1	100961
1	30	1.00000	EA	WIRE 22 AWG BLK	100962
1	40	1.00000	EA	WIRE 22 AWG GRN	100963
1	50	1.00000	EA	WIRE 22 AWG BRN	100964
1	60	1.00000	EA	WIRE 22 AWG RED	100965
1	70	1.00000	EA	WIRE 22 AWG ORG	100966
1	80	1.00000	EA	WIRE 22 AWG BLU	100967

Start: 10   Delta: 10   Numbering   Cancel

The starting point and the size of increment in the numbering must be entered.

8.7.4   Changing information on the position

This command modifies the BOM data. This function can also raise or lower the necessary number of parts.

Function call:

Tab "**Edit**" => Group "**Change position**" => "**Change position**"

If this function is used for several selected positions, the position numbers and the variant numbers cannot be changed.

If the entries are confirmed, another form appears into which the remarks for the list of modifications can be added.

The default values for the position entries are set via the PRO.FILE Management Console.

8.7.5   Delete Position

Remove a BOM item from the current assembly.

➡	**Function call:**
	Tab "**Edit**" => Group "**Change position**" => "**Delete position**"

If the selected part has been built into other parts or assemblies all the places where it has been added will be listed (the parts usage) after the delete command is initiated.

If a part with any appended parts has been added to any assemblies which have been locked by another user, a message will be displayed that the part is locked.

Finally, it is possible to add entries to the list of modifications.

8.8   Link parts

PRO.FILE generally recognizes four different groups of data (entities or object groups):

- Parts
- Documents
- Projects
- Transmittals

Parts and documents can both exist independently of other object groups;

There is often a connection between a document and a part (e.g. test specifications, setting sheets etc. are necessary for the completion of a part). At this point an allocation can be made via the function Link

> **Function call:**
>
> Tab "**Edit**" => Group "**Create link**" => "**Create link**"

Linking process:
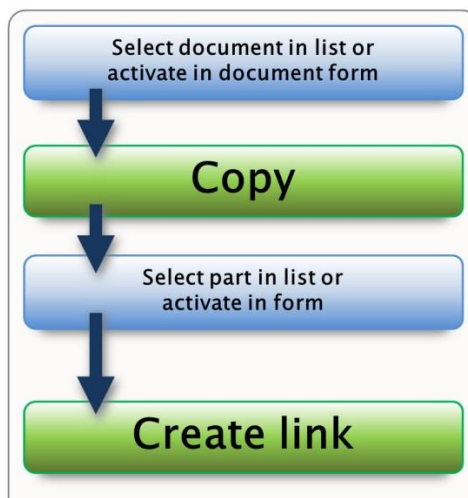
These functions can also be executed using the Drag & Drop function in Microsoft Windows.

Several memorized objects can also be linked to several selected objects in a list.

9 Locking and unlocking of PRO.FILE objects

If you want to edit a document or any other PRO.FILE object and want to save the changes back to PRO.FILE, this object has to be locked from other users from the moment the changes begin.

- When a data record is being edited, it is automatically locked by PRO.FILE

- Only by using the function "Lock" you can make sure, that other users are not making changes to the same document at the same time.

- With the function "Unlock" the document is made available again to other users for editing.

For detailed information see the following sub-chapters:

- [Locking and unlocking of part descriptions](#)

- ["Lock" the document](#)

- [The "Unlocking" of documents](#)

The locking of a document makes sure that the document is not modified by other users in the meantime:

- A locked document can be opened by other users via the function "Display". However, these other users cannot save back any changes to the locked document to PRO.FILE.

- If the document has been opened and not locked, other users may make changes to the document in the meantime and save those changes back to PRO.FILE. In this case, it will no longer be possible for you to save your own changes back to PRO.FILE.

Note:

A document is locked automatically, if it is opened for editing. A manual locking is not required in this case.

9.1   Locking and unlocking of part descriptions

For the work in a team it may be necessary to lock a part description, so that it cannot be edited by other users temporarily. This lock can be removed at any time, provided that the user has the required permissions.

Function call:

"Edit" => "Lock/Unlock"

Locked parts cannot be deleted, changed or moved to a different status. Before the part is actually locked or unlocked, a dialog is displayed.

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Lock all marked parts?

Yes   No
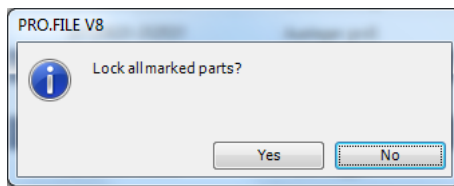
Note:

If the function "Lock/Unlock" is applied to several selected part descriptions, the change of the lock status (lock unlocked parts or unlock locked parts) is checked for the first selected part descriptions. All other parts having a different lock status than this first part remain untouched.

An automatic (temporary) lock is made if the data record is being edited. If the system is closed unexpectedly, the lock flag remains. It can then be later removed via the function "Lock/unlock".

9.2   "Lock" the document

If a document is locked, it cannot be edited by another user!

Function call:

"Edit" => "Lock/Unlock"

To lock a document manually Proceed as follows

1. Mark the object to be locked in PRO.FILE.

2. Select the menu "Edit" from the menu bar.

3. Select the function "Lock/Unlock".

⇒ With the display of status information in this list PRO.FILE checks:

- whether the user has the permission to edit the document.

- whether the active documents are up to date and have not been modified by a different user since their opening.

- whether the active document does not already have a lock flag.

⇒ If any of these checks returns a negative result, the document cannot be locked!

4. Confirm with <**Yes**>.
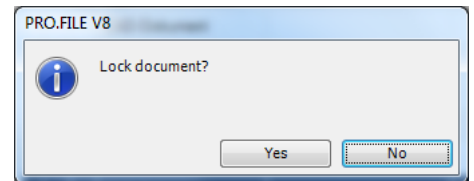
⇒ By the command "Lock", the access permission to edit the document is checked for the current user, and the document is locked for all other users in the database.

Once the CAD document is locked, it can be modified. The changes are then saved back to PRO.FILE via the function "Save".

9.3   The "Unlocking" of documents

In analogy to the function "Lock" you can unlock documents that have been locked by you by using the function "Unlock".

Note:

You can only unlock documents that have been locked by you. The right to unlock documents that have been locked by other users can only be given to administrators.

Function call

"Edit" => "Lock/Unlock"

To unlock a document Proceed as follows

1. Select the document to be unlocked in PRO.FILE.

2. Select the menu "PRO.FILE" from the menu bar.

3. Select the function "Lock/Unlock"

4. Confirm your selections with <OK>.
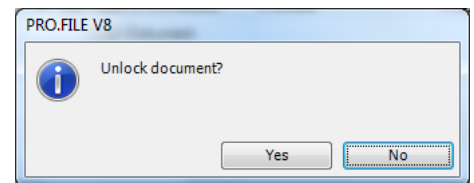
⇒ The lock flag for the selected CAD document is now removed.

9.4   More information: the dependent tab "Status information"

When working in a list or form, it is very helpful to be able to identify locked parts in a system message in the status bar of the PRO.FILE window.

The dependent tab "Status" provides users with further information on the current data record. This includes workflow status, project designation, information on who locked the data record and when, and information on who retrieved an attached document and when

An automatic lock (temporary) occurs when a record is being edited. If the system is uncontrollably left, the lock details remain. It can be released again, with the use of the function Lock/Unlock.

If the function is used on several marked records, the condition changes are made according to the first record. The record that does not have the same lock condition remains unchanged.

10   Copy and link PRO.FILE Objects

As already explained in the previous chapters, links can be established between different types of data objects.

Link process

Linking a document description to a part description:
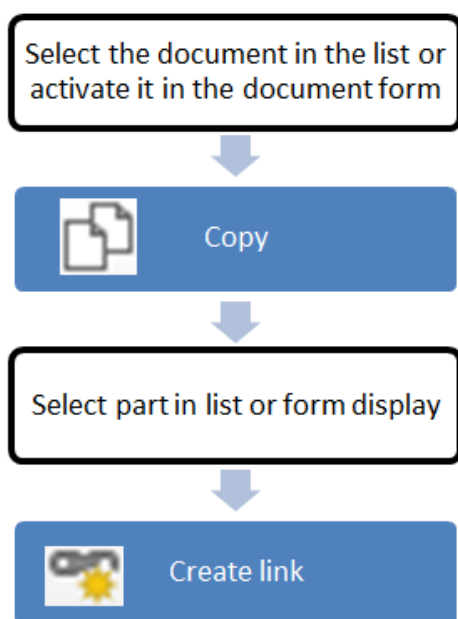
Linking a part description to a document description:
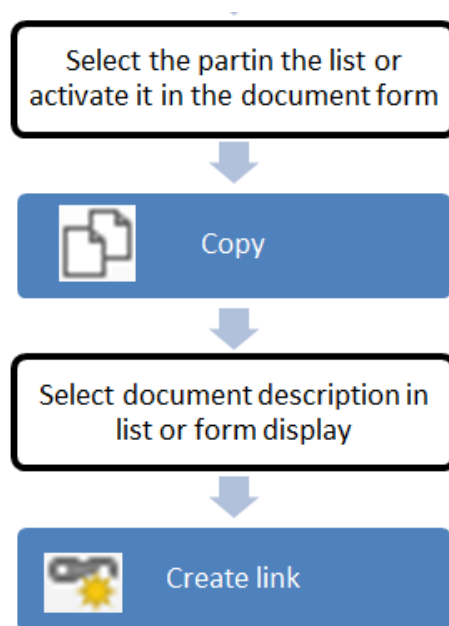
Such links can also be created via drag&drop (see chapter "Note: Document management using drag & drop").

It is also possible to link several copied objects to several selected objects in a list.

10.1 Linking of PRO.FILE objects

To create links between PRO.FILE objects, proceed in two steps:

- [Copy the object reference to the PRO.FILE clipboard](#)
- [Creating a link between PRO.FILE objects](#)

For details see the following chapters.

10.1.1 Copy the object reference to the PRO.FILE clipboard

Function call
"Edit" => "Copy"

The function "Copy" puts the selected object into the PRO.FILE clipboard (similar to the Windows clipboard, but the information cannot be used in other systems).

10.1.2 Creating a link between PRO.FILE objects

To link PRO.FILE objects (that have been copied to the PRO.FILE clipborad) to another PRO.FILE object, the function "Create link" is used.

Function call
"Edit" => "Create link"

The copied object(s) is/are then linked to the selected object and are displayed in the structure.

10.2 Versions and link types: static and dynamic links

The versioning of documents and parts affects the links between the PRO.FILE objects.

If a link refers to a versioned object, the question is:

- Should the link be static to a specific version of the document/part, or
- Should the link always be updated and point to the new version of the document/part?

In order to meet the different requirements, the link type between two PRO.FILE objects can be changed from "static" to "dynamic" and vice versa.

The difference between static and dynamic links

- Dynamic link: The document that is versioned is updated in the structure.
- Static link: Only the current version (not future versions) are linked in the structure

Which object types in PRO.FILE allow static and dynamic links?

Static AND dynamic links are possible for the following object type combinations:

- Projects and documents
- Projects and parts
- Documents and documents
- Parts and documents

How to recognize the current link type

The link type is indicated by different icons for the linked objects. Static links are always indicated by a "lock":

Static link: The link refers to a specific version of the documents (or part).

Dynamic link: The link refers to the newest visible version of the document (or part).

10.2.1 Document-Document links

In the document structure, there are two basic types of links:

- Manually created links ("Copy" -> "Create link")
- Links established by a CAD integration

The first links are, by default, dynamic. This means, when a version of a document is created, the link to this document is automatically switched from the old version to the new version. The user can change such a link from dynamic to static. In this case, the switching of the link is not made automatically.

CAD links are not automatically switched, when a new document version is created. These links have to be updated within a CAD integration. These links are static.

10.2.2 Links between transmittals and documents

Links between transmittals and documents are always static.

A transmittal is assigneed a specific version of a document: the version the transmittal is sent with. When a new version of the document is created, the link of the previous version to the transmittal remains unaffected thereof.

10.2.3   How to change the link type

In the tabs "Browser" and "Where used" the function "Change link type (dynamic <-> static)" can be called from the "Edit" menu.

To change the link type Proceed as follows

- Select the linked object in the structure, for which you want to change the link type.
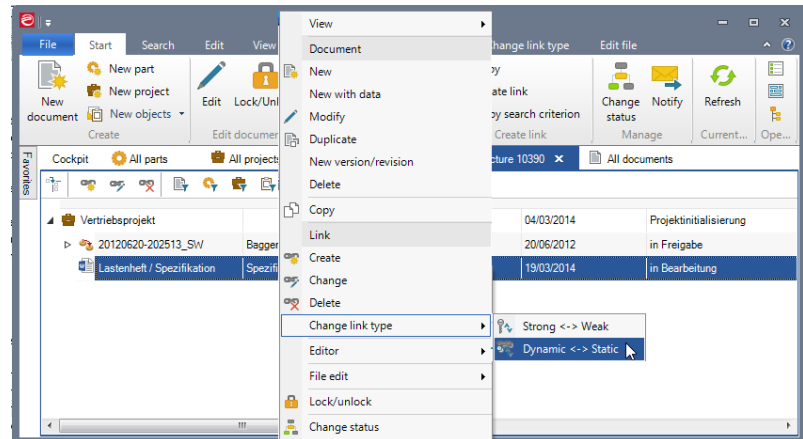
- Select the command "Change link type" => "Dynamic – Static"either from the "Edit" menu or the context menu.

- Confirm the change of the link type with <Yes>.

- The linked object is now displayed with the changed link symbol in the browser.
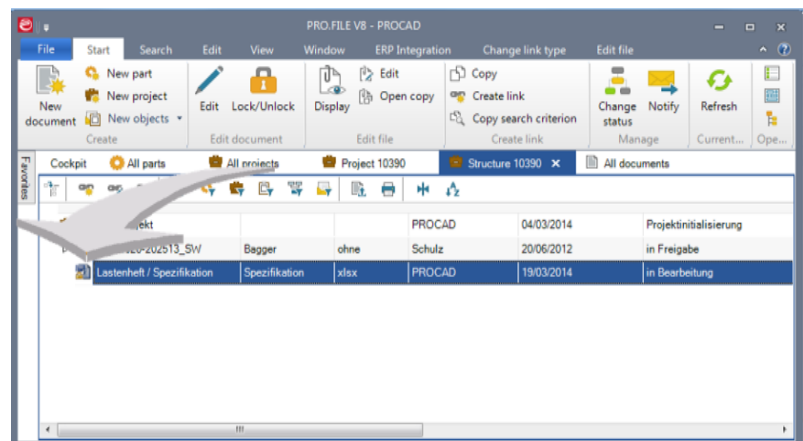
The link type has thus been changed

11   PRO.FILE status management: Support and Control your Workflow

PRO.FILE enables a company to control and supervise workflow according to what is necessary, such as the process of product development or the process of release.

In this way, the organisation of work processes can be shown in PRO.FILE through the description and setting of separate statuses that each describe a process. A part or document can be moved from within the set status into a specified order, parallel, or sequential, and transported from one status to another.

With the status management of PRO.FILE it can be made sure that a part or document that is set for viewing, noting, or editing, reaches the colleague that it is intended for and only the colleague that it is intended for, and that it contains all the necessary information.

The following picture shows a typical life-cycle of a part from design to manufacturing to archival of the part and its related documents.
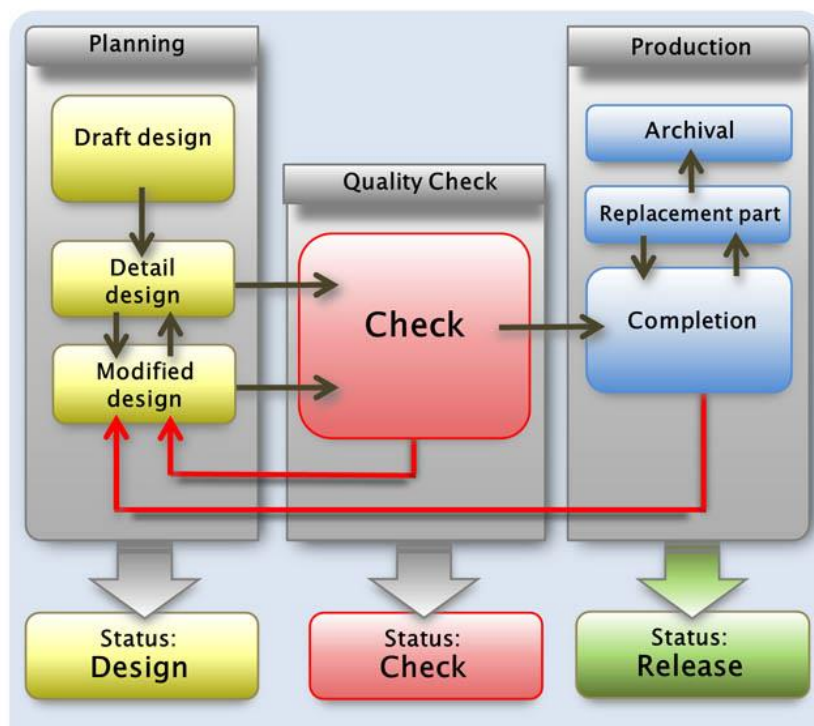
The PRO.FILE status management contains the following points:

- Modeling of the processing ways of parts, documents and projects

- Release procedure

- Integration of e-mail

- User and access rights

By using user and access authorities, you can be sure that only certain users and user groups have the right to carry out the status change, while others have the rights to view, examine, edit etc. documents and parts for all statuses.

11.1 Transfer of a document, part or project into another status

This feature allows you to transfer a part, document or project from one status to another status.

	Function call:
	"Edit" => "Change status"

After calling this function, a selection menu will appear where you can select the desired target status.

	Note:
	Should several objects that have different statuses, need to be moved using the Status change top-down, then the status change will only be carried out for those objects for which this status change is allowed.

11.1.1 Status change depending on several users

A status change can be configured to depend on several users or group branching. All the users who are authorized to make this change of status have to confirm the change (sign-off) before it can be carried out.
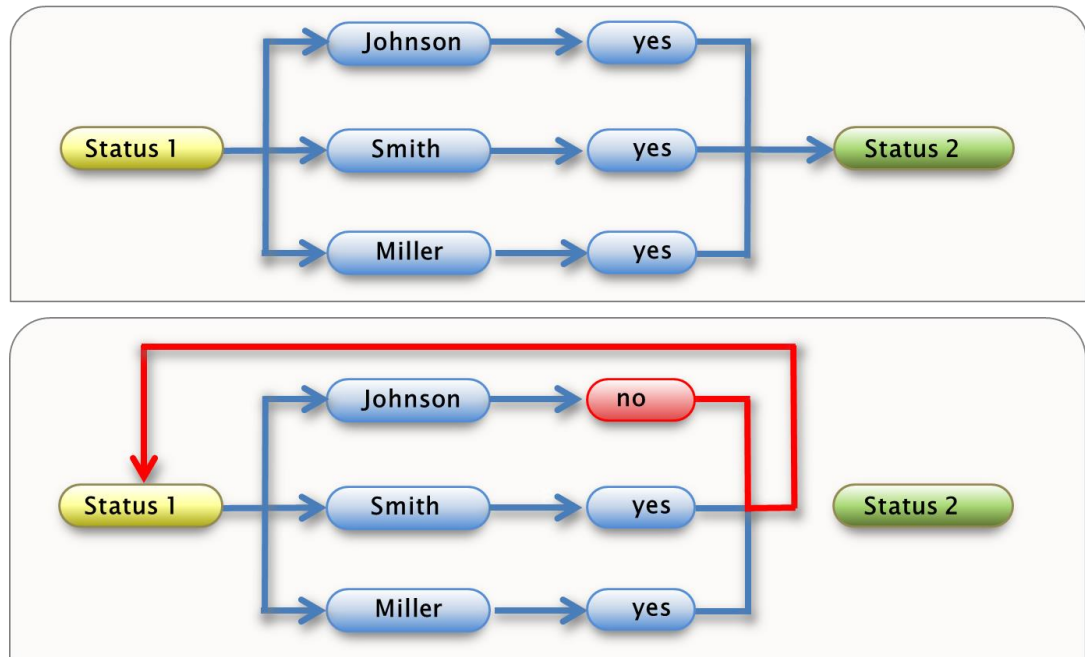
An additional dialog box will be displayed after the next status is selected. The right side of the dialog box lists all users who have to agree to the change in status. The left side lists the users who have already agreed (signed-off). Users who have not yet agreed are able to determine whether the change of status takes place.

Reset can annul the agreement of the users. Cancel terminates the sign-off process.

If a user has agreed to a status change with multiple sign-off approval, then no other status can follow. The selection dialog box for the next subsequent status will not be displayed.

11.2 The functions "Seen and approved" or "Seen and rejected"

The functions Seen and Accepted or Seen and Rejected cause an entry to be made in the status log which expresses either acceptability or rejection of a processing step.

This function documents the process of authorization and the checking procedure without determination of a status definition in advance.
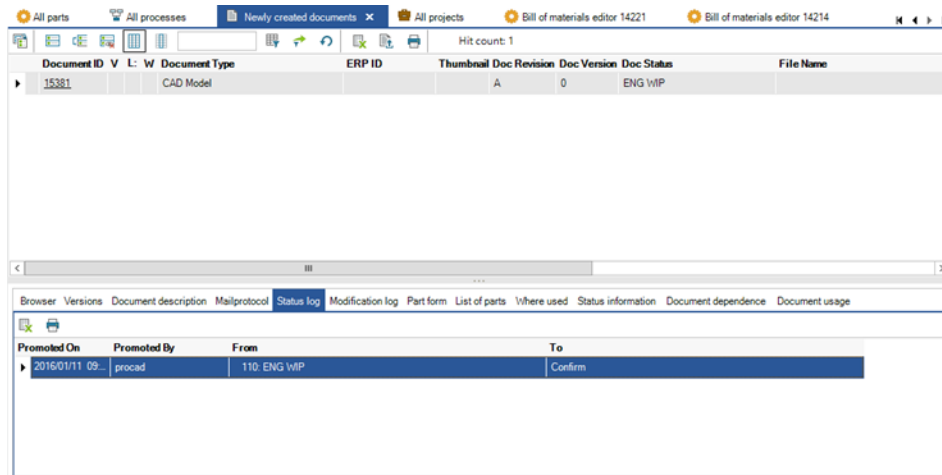
11.3 Problems with status changes

An error message will appear if a change in status is not possible.

The error message includes, for example, an ID number as well as the designation and the PRO.FILE ID of the part.
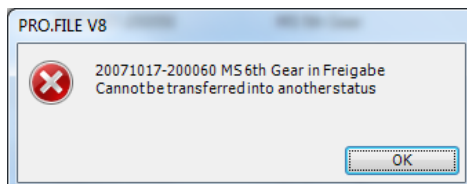
There are several possible causes for this. In particular, the workflow definition in the administration functions and the way the user rights are regulated should be checked as well as the possible existence of a lock message.

The current status is shown in the dependent tab "Status information" like the Lock function.

If one or more errors occur during this action, they will be shown in an error window. The error window is made up of two columns, error message, and brief information relating to the affected object.

The actions "Edit, Copy" and "View, List" are usable for the data in the window.

11.4   Status change top-down

If an assembly or other structure consisting of linked parts, documents or projects is to be transferred into another status, it can be quite tedious to select each object individually.

For this purpose, the function "Status change top-down" is available. All objects linked to the mother object are then transferred into the same target status.

Function call:
"Edit" => "Status change top-down"

In the following table you can decide which linked objects should be transferred into the next subsequent status.

The selection for parts is on the left hand side, the selection for documents is on the right. The following settings are available:

- **None:**
  No parts or documents are included in the workflow.

- **First level:**
  Only those parts or documents of the first, subordinate level are included.

- **All:**
  All parts or documents in the structure are included in the workflow.

Note:
Should several objects that have different statuses, need to be moved using the Status change top-down, then the status change will only be carried out for those objects for which this status change is allowed.

The user selection regarding the depth of documents and parts for "Status change top-down" is saved in the database when PRO.FILE is closed. After a new start of PRO.FILE the saved setting is displayed again when the function "Status change top-down" is used.

> **Attention: Status change Top-Down without transmittals**
>
> Transmittals are not part of the status handling. When a status change top-down is applied to a project, the linked transmittals are ignored.

11.5   Real-time simulation of the function "Status change top-down"

The function "Check status change top-down" gives users the possibility to simulate a change of status before performing the actual status change.

This allows them to verify whether the desired change of status can actually be carried out as planned.

> **Function call: "Edit"**
>
> => "Check status change top-down"

Often related documents are in different workflow statuses, under circumstances also in statuses with lock entry or the user has no access rights. Then the "Status change top-down" cannot be performed correctly.

In the following table you can decide which linked objects should be transferred into the next subsequent status.

After the selection is confirmed, PRO.FILE simulates the status change and displays a list of problems that would occur if the status change were performed for real.

Problems during the planned workflow can be checked and eliminated.

11.5.1 Problems during Status change top-down

With the pure simulation, a disturbance of the data structure can be excluded for the actual status change.

> **Note:**
>
> The function "Check status change top down" is a pure simulation. No actual status change is performed.

11.6 Notify

Messages can be sent to the user with the help of a report generator and a mail interface. The user who has been informed is documented in the status log.

Further information on the operation of the mail interface can be found in the manual of the PRO.FILE Mail Connector for Lotus Notes or Microsoft Outlook.

The function "Notify" is available for documents, parts and projects.

12   Transmittal: digital dispatch list with PRO.FILE

The functions for using "transmittals" in PRO.FILE are described in the following chapters:

- [What is a transmittal](#)
- [Working with "Transmittals"](#)
- [Further Functions for transmittals](#)
- [Link between transmittals, documents and projects](#)
- [Delete a transmittal](#)
- [Functions to lock/unlock a transmittal](#)
- [How to send a transmittal](#)

12.1   What is a transmittal?

With PRO.FILE the user can access an object type called "Transmittal". Transmittals are distribution lists containing documents that are stored in PRO.FILE. Transmittals are used to record the distribution of documents with customers, external service providers and suppliers.

Large projects use transmittal to record drawing and document numbers along with their version and revision states, documenting the project's progress and responsibilities. Transmittals record the actual document versions at the time of distribution.

PRO.FILE manages transmittals as independent objects that allow assignment of CAD file and document versions.

You can display the structure of any transmittal using the browser. You can modify the structure as long as the transmittal has not been sent.
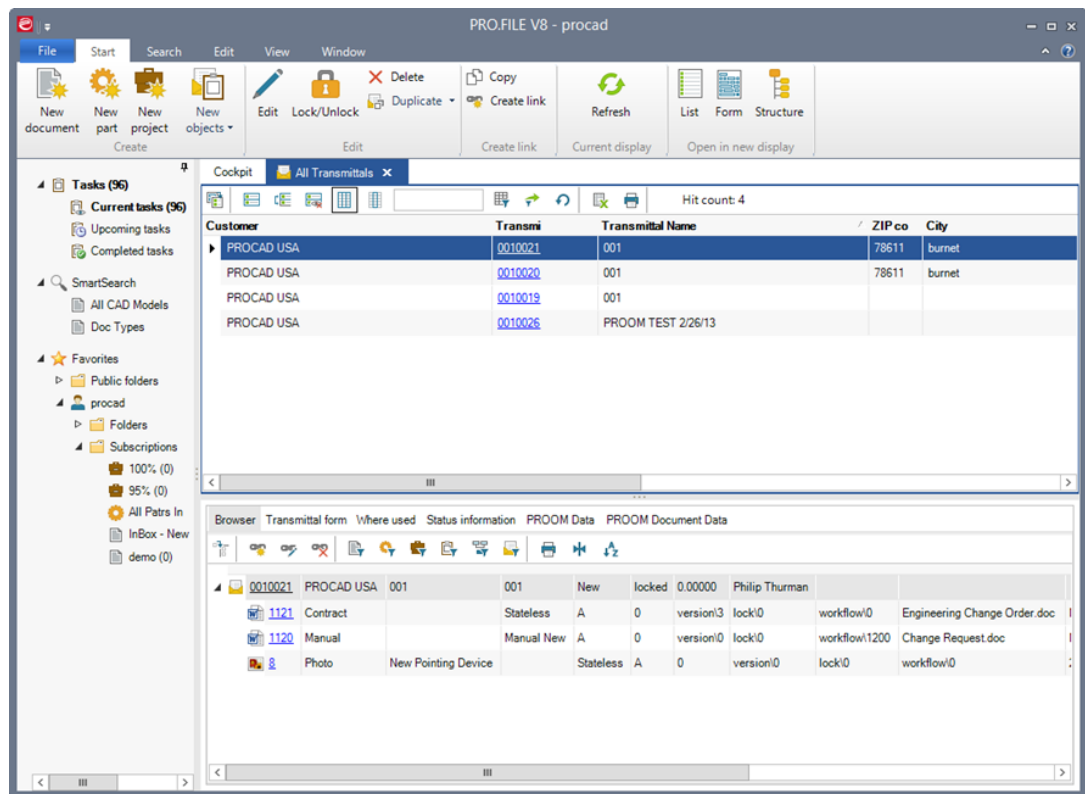
The transmittal object features a distribution date, twenty string and five numeric database fields. These can be configured by the administrator in the PRO.FILE Management Console.

12.1.1   Informal or referencing: What types of transmittal do exist?

If documents are linked to a transmittal, the editing state of the documents at the time of transmittal sending is documented.

The question now is, whether the linked documents can be changed after the sending – or whether changes can only be made to a new version/revision of the documents.

There are two types of transmittals serving both of the above options. You can decide at different locations, which type of transmittal you want to use:

- Referential transmittal
  In case of a referential transmittal, all documents of the document structure are linked to the transmittal after sending. These linked documents can only be modified by creating a new version or revision. The sent state of the files is thus fixed in PRO.FILE and cannot be changed.

Note: Referential transmittal

In order to change a document sent with a referential transmittal, a new version or revision of the document has to be created.

- Informal transmittal
  In case of an informal transmittal, the files of the sent documents are packed in a zip file. This zip file is saved in PRO.FILE. A document description is automatically created in PRO.FILE and linked to the transmittal. This document description cannot be modified. The original documents themselves are also linked to the transmittal – however, they can be changed after sending. The sent state of the files remains fixed in the zip file.

12.2   Working with "Transmittals"

Before you can attach documents or CAD files to a transmittal, you must create a transmittal description first.

A form is displayed for entering transmittal meta data. After completion, the entire record will be displayed in the current window.

Transmittals may be modified as long as they have not been sent. Once sent, you will no longer be able to modify the transmittal.

Proceed as follows

- [Step 1: Creating a transmittal](#)
- [Step 2: Link documents to be transferred to the transmittal](#)
- [Step 3: Lock transmittal and send it](#)

12.2.1   Step 1: Creating a transmittal

Data is transferred from PRO.FILE to the recipient via transmittals. This means that a transmittal has to be created in the first step for the transfer.

If you already have a transmittal that you want to use for the transfer, you can skip this first step and continue with ["].

	Function call: Create a transmittal
	"Start" => "New transmittal"

Proceed as follows

1. Create a new transmittal, either via the function "Cockpit" => Icon "**Create Transmittal**" or via Menu: "**Start**" => "**New objects**" => "**New transmittal**".

2. Enter the required information for the description of the new transmittal.

3. Confirm with <**Finish**>.

⇒ The transmittal has been created.

Note: Automatic linking in case of activated project

If a project is activated (visible in the PRO.FILE title bar) while the transmittal is created, the new transmittal is automatically linked to this activated project.

12.2.2   Step 2: Link documents to be transferred to the transmittal

The document is transferred to the recipient via a transmittal. The document therefore has to be linked to the created transmittal. Proceed as follows

1. Start a search for the document to be transferred via "**Selection**" => "**Documents**".

2. If the document is displayed in list view, please select it.
   (If it is displayed in form view, it is already selected).
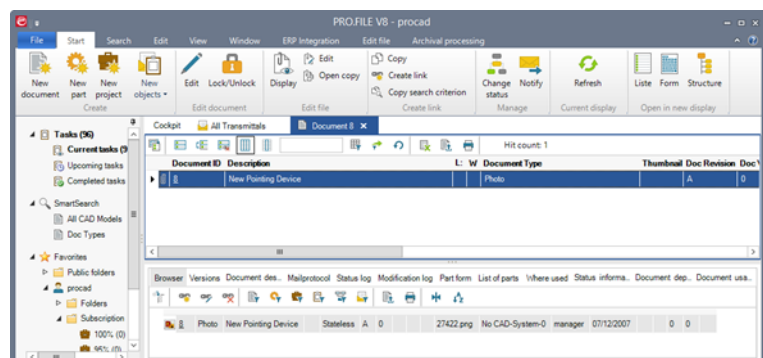
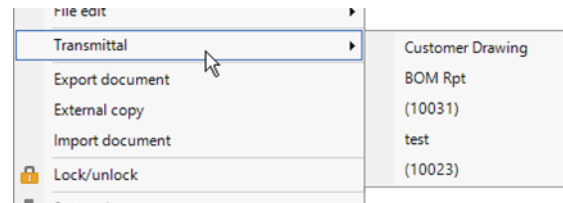|	Note: Transfer of several documents – select several documents
	Of course you can transfer several files simultaneously from PRO.FILE to PROOM. To do so, select all the documents you want to transfer. The files from all selected document descriptions are then copied to PROOM.

Select the transmittal for transfer:

3. Open the context menu for the selected document (right mouse button) and select the function "**Transmittal**".

All transmittals to which documents can be linked are now listed in the sub-menu.

	Note: Only non-locked transmittals can be selected
	For the linking, you can only select transmittals that have not yet been sent or locked for sending.

4. Confirm the security question, whether the document is to be linked to the transmittal with <**Yes**>.
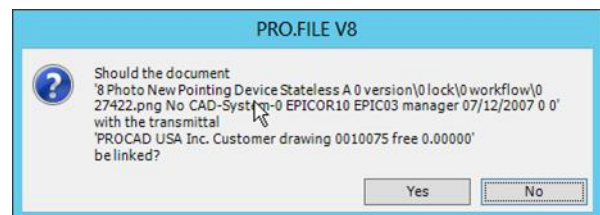
5. The document is now linked to the transmittal. The link is visible in the structure view of the transmittal and in the "Where used" list of the document.
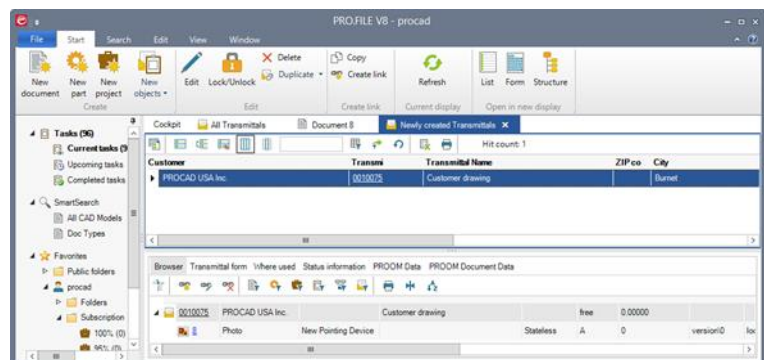
6. If you want to add more documents, repeat this process.

12.2.3   Step 3: Lock transmittal and send it

You can now start the transfer of the selected files.

Proceed as follows

1. Select the transmittal to be transferred.

2. Select the function "**Lock before sending**" from the "Edit" or context menu.

3. The transmittal is now locked and ready for sending.
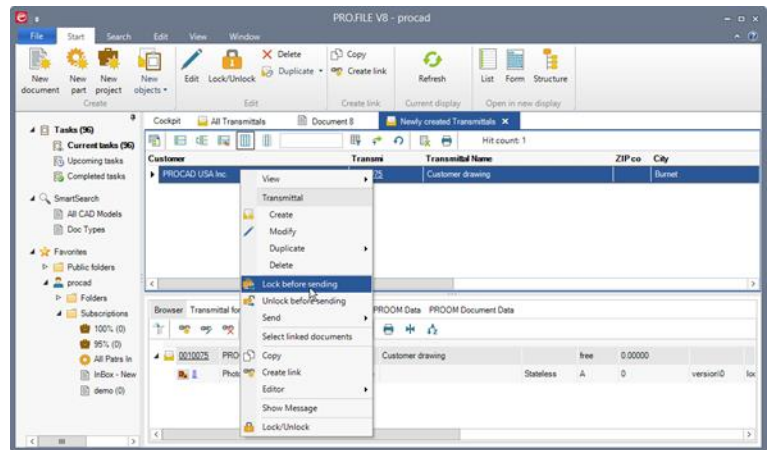
4. Select the function "**Send**" => "**E-Mail**" from the "Edit" or context menu.

⇒ A dialog for entering the recipient and the message text is displayed
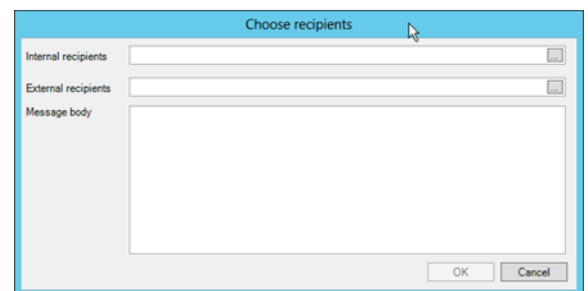
5. Enter the internal recipient (=name of the PRO.FILE user) or the external recipient (e-Mail address).

6. Add a message text.

7. Click <**OK**> to send the transmittal.

12.3   Further Functions for transmittals

Prior to sending a transmittal, commands for creating, editing and modifying are offered by PRO.FILE.

You can select a transmittal by using the "Transmittal" command from the "Search" menu. PRO.FILE will then display a form that allows for entering search criteria.
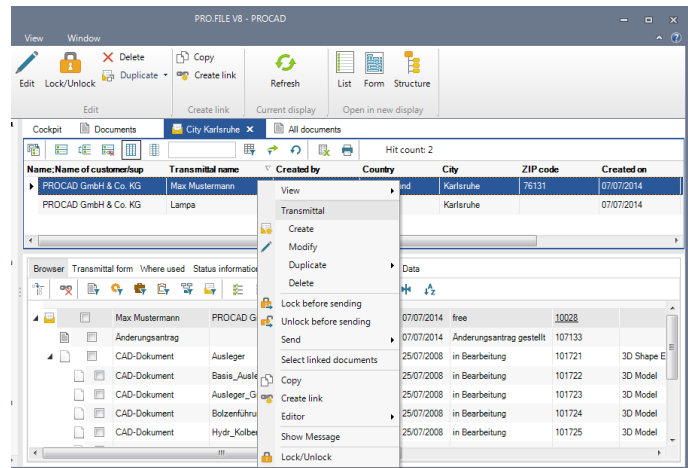
When a transmittal form is activated, a special menu for the handling of transmittals is available.

- **Create:**
  Create a new transmittal as described in the previous chapter "[Step 1: Creating a transmittal](#)".

- **Modify:**
  Change the transmittal description. Changing is only possible as long as the transmittal has not been sent or locked for sending.

- **Duplicate:**
  Using the "Duplicate" command, you can copy a transmittal including its structure. PRO.FILE will offer you the opportunity of modifying the transmittal description before the duplication process is complete.

  - **Duplicate**: The transmittal is duplicated with the recently linked versions of the attached documents.

  - **Duplicate with newest versions**: The PRO.FILE transmittal is duplicated with the newest versions of the attached documents that are visible for the user. Please note that there may be newer versions that the user is not allowed to see.

  - **Duplicate with newest, released versions:**
    The PRO.FILE transmittal is duplicated with the newest versions of attached documents that are in a released status and are visible for the user.
    This does ignore versions that are newer but not released or that are released but not visible to the user.

- **Delete:**
  Deletes a transmittal that is not locked or has not been sent yet. See chapter "[Delete a transmittal](#)".

- **Lock before sending / Unlock before sending:**
  A transmittal can only be sent if it is locked. If you want to modify a locked transmittal before sending you can unlock it again.
  See chapter "[Functions to lock/unlock](#) a transmittal".

- **Send:**
  To send a transmittal, you have to select the sending method: Via e-mail, via report or as data transfer to PROOM.
  See the following chapters "[How to send a transmittal](#)" and "[Via transmittal: Data exchange from PRO.FILE to PROOM](#)".

- **Select linked documents:**
  If there are many documents linked to a transmittal, you can use this function to start a search that only relates to documents linked to this transmittal.
  The displayed search form is the usual search form but the result is limited to documents linked to the selected transmittal.

- **Copy:**
  With this function, a transmittal is "copied" in order to link it to a project. See chapter "[Link between transmittals, documents and projects](#)".

- **Create link:**
  This function is used to link "memorized" documents to the transmittal. See chapter "[Step 2: Link documents to be transferred to the transmittal](#)".

- **Show message:**
  If a message has been entered during the sending of the transmittal, this message can be viewed with this function at a later time. If no message has been entered or the transmittal has not yet been sent, no message can be displayed and an error message is shown instead.

- **Lock/Unlock:**
  This function locks the transmittal so that it cannot be modified by other users. The procedure is identical to the locking of other PRO.FILE objects. The lock can be removed by using the same function again.
  For more information see the chapter "[Locking and unlocking of PRO.FILE objects](#)".

12.4   Link between transmittals, documents and projects

In order to work with transmittals within the PRO.FILE structures there are two possibilities for linking:

Link a document to a transmittal:

PRO.FILE offers "**Create link**" and "**Delete Link**" commands for maintaining the structure of transmittals.

- "Link" results in the insertion of a document or CAD file that has been previously copied to the PRO.FILE Clipboard. You may remove documents or CAD files from the transmittal as long as the transmittal is not locked or has not been sent

- Once the transmittal has been sent, it can no longer be modified. Already distributed transmittals are write-protected.
  A detailed error message will inform you about the error.

To directly link a document from the PRO.FILE document list to a transmittal see the previous chapter "[Step 2: Link documents to be transferred to the transmittal](#)".

Link a transmittal to a project:

You can "Copy" one or several transmittals and "link" them to one or several projects:

Proceed as
follows

1. Start a search for the transmittal to be linked via "**Search**" => "**Transmittal**". If the transmittal is displayed in list view, please select it. (If it is displayed in form view, it is already selected).

2. Open the context menu for the selected transmittal (right mouse button) and select the function "**Copy**".

3. Now select the project, the memorized transmittals has to be linked to. If the project is displayed in list view, please select it. (If it is displayed in form view, it is already selected).

4. Open the context menu for the selected project (right mouse button) and select the function "**Create Link**".

⇒ The transmittal is linked to the project.

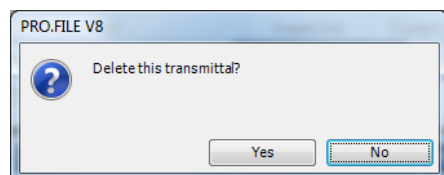⇒ The link is shown in the "Browser"-tab for the project as well as in the "Where used"-tab of the transmittal.

Note:

Transmittals can only be linked to projects.

12.5   Delete a transmittal

You may delete a transmittal that has not been sent from the database using the function "**Delete**" from the "**Edit**" menu.

Once sent, you will no longer be permitted to delete a transmittal.

12.6   Functions to lock/unlock a transmittal

- The function "**Lock before sending**" protects transmittals from access and modification and makes them ready for sending. Only locked transmittals can be sent.

- The function "**Unlock before sending**" is used to make a locked transmittal available again for changes or attaching further documents.

- "**Unlock before sending**" is only available until the transmittal has been sent. It is then no longer possible to unlock it.

12.7   How to send a transmittal

By sending a transmittal, the transmittal is stored and can no longer be modified nor deleted. In this way, a transmittal protocols the status of the attached documents beyond doubt.

No usage data is sent with a transmittal. A transmittal only contains references to the meta data.

A transmittal has to be locked before sending. It is not possible to send an unlocked transmittal.
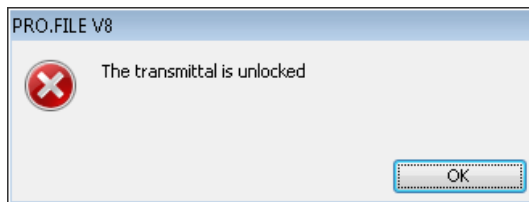
After locking, the transmittal can be sent using the function "**Send**" from the "**Edit**" menu.

If you use the function, you can then enter the internal recipients (PRO.FILE users) or external users (e-mail addresses). You can also add a message text.
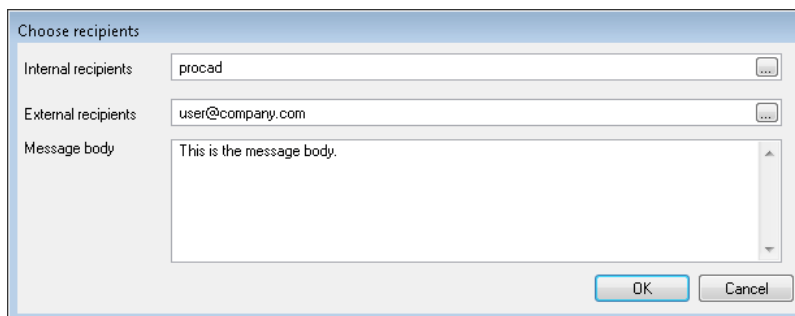
If the screen is confirmed with <**OK**>, the transmittal is sent.

From this moment, the transmittal is marked with a sending date. The transmittal can no longer be changed.

12.7.1   Using the report interface (option) for transmittals

Via the report icon in the browser display, the title sheet of the transmittal can be displayed. It is also possible via this icon to display the sent files and protocols of the sending process. This function is not available in the PRO.FILE standard but has to be configured customer-specifically.

12.8   Via transmittal: Data exchange from PRO.FILE to PROOM

Starting with PRO.FILE 8.3 Servicepack 7, PRO.FILE contains functions for the exchange of files between pf and PROOM. It is thus possible to publish files from PRO.FILE directly in a project space in PROOM. After the selection of the documents to be transferred,

these are linked to a transmittal. This transmittal is sent to a publication place in PROOM, and the linked files are uploaded there.

See the following chapters:

- [Step by step: Data from PRO.FILE to PROOM](#)

- [Dependent tab: Information on the sending](#)

- [Manage PROOM access](#)

Note: What is PROOM?

PROOM is the web-based portal with virtual project spaces for easy uploads and downloads of files of several gigabytes in size.
PROOM is the Microsoft Cloud Service Partner Excellence Award winning solution of 2011 and uses Microsoft's cloud solution Windows Azure, so that companies can exchange XXL files quickly and easily.

PROOM offers:

- Work in the team! – Concentrated collaboration directly in the virtual project space

- Simple exchange of large files via mouse click

- High data security

- Individual access permission concepts

- Access anywhere anytime

- Integrated activity log

- Significant time saving

- Simple to use

- Adjustable to corporate design

PROOM is suited for all business and private customers who want to

- exchange large files quickly and easily,

- access their files securely from anywhere,

- keep an overview of who has uploaded which files, but also who has downloaded them and when.

For detailed information see www.proom.de

12.8.1 Step by step: Data from PRO.FILE to PROOM

- Four steps are required to upload files saved in PRO.FILE into a project space in PROOM. Just follow the instructions in the following sub-chapters:

- [Step 1: Creating a transmittal](#)

- [Step 2: Link documents to be transfered to the transmittal](#)

- [Step 3: Lock transmittal and send to PROOM](#)

- [Step 4: The "Publish" dialog](#)

12.8.2 Step 1: Creating a transmittal

Data is transferred from PRO.FILE to PROOM via transmittals. This means that a transmittal has to be created in the first step for the transfer.

If you already have a transmittal that you want to use for the transfer, you can skip this first step and continue with "[Step 2: Link documents to be transfered to the transmittal](#)".

	Function call: Create a transmittal
	"PRO.FILE" => "Start" => "New transmittal"

Proceed as follows

1. Create a new transmittal, e.g. via the functions

2. "**Cockpit**" => Icon "**Create Transmittal**"

3. Menu: "**Start**" => "**New transmittal**"

4. Enter the required information for the description of the new transmittal.

5. Confirm with <Finish>.

⇒ The transmittal has been created.

12.8.3   Step 2: Link documents to be transfered to the transmittal

The document is transfered from PRO.FILE to PROOM via transmittal. The document therefore has to be linked to the created transmittal.

Proceed as follows

1. Start a search for the document to be transferred to PROOM via "Search" => "Documents".

2. If the document is displayed in list view, please select it.
   (If it is displayed in form view, it is already selected).
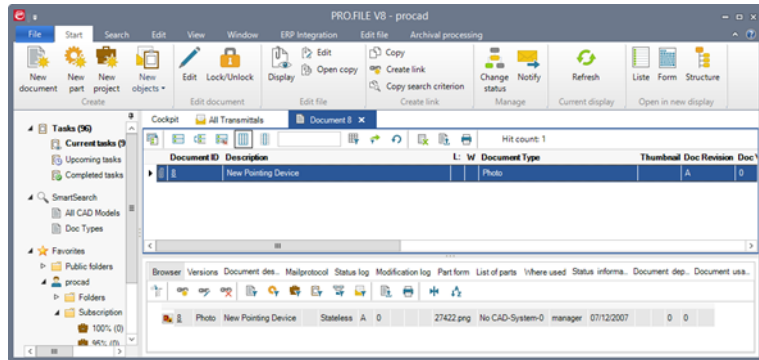
Note: Transfer of several documents – select several documents

Of course you can transfer several files at the same time from PRO.FILE to PROOM. To do so, select all the documents you want to transfer. The files from all selected document descriptions are then copied to PROOM.

Select the transmittal for transfer:

3. Open the context menu for the selected document (right mouse button) and select the function "**Transmittal**".

4. All transmittals to which documents can be linked are now listed in the sub-menu.
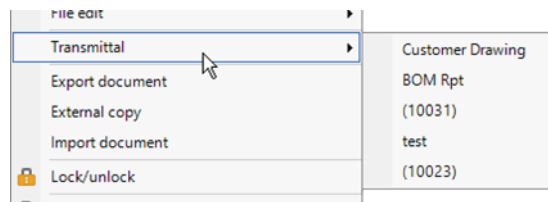
Note: Only non-locked transmittals can be selected

For the linking, you can only select transmittals that have not yet been sent or locked for sending.

---

5. Confirm the security question, whether the document is to be linked to the transmittal with <**Yes**>.
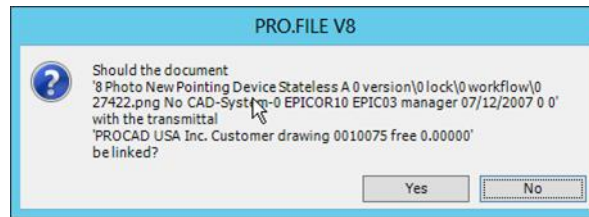
6. The document is now linked to the transmittal. The link is visible in the structure view of the transmittal and in the "Where used" list of the document.
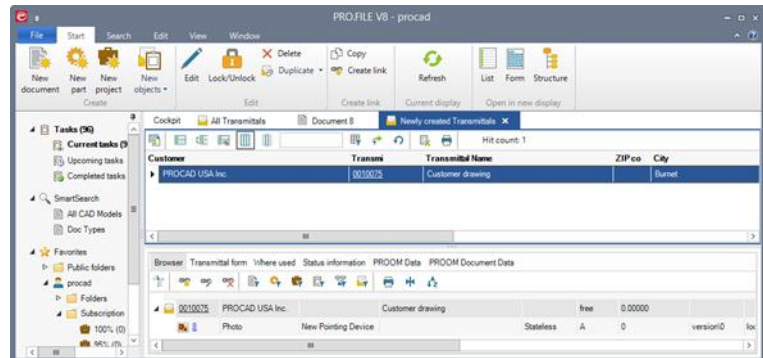
7. If you want to add more documents, repeat this process.

## 12.8.4   Step 3: Lock transmittal and send to PROOM

You can now start the transfer of the selected files into a desired PROOM project space.

Proceed as follows

1. Select the transmittal to be transferred to PROOM.

2. Select the function "**Lock before sending**" from the "Edit" or context menu.

3. The transmittal is now locked and ready for sending.
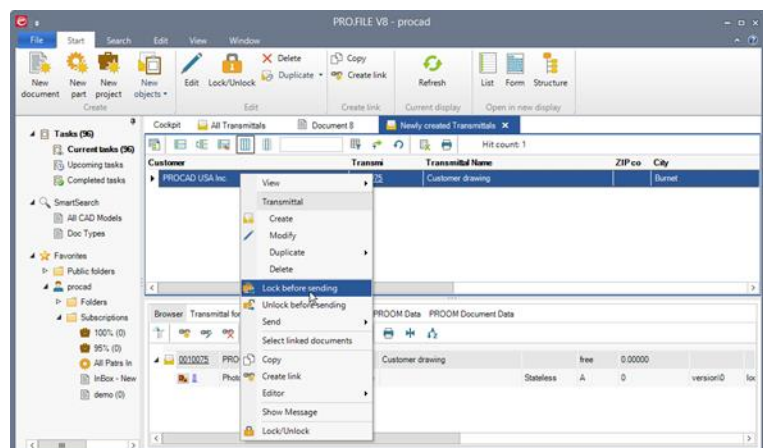
4.   Select the function "**Send**" => "**PROOM**" from the "Edit" or context menu.
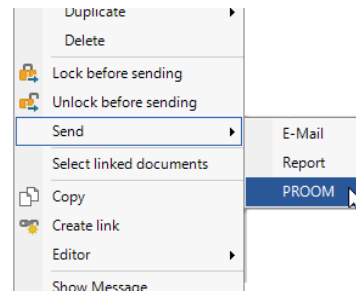
5.   The publication dialog is displayed, as described in the following "Step 4: The "Publish" dialog".

12.8.5   Step 4: The "Publish" dialog

You now have to specify which publication place in PROOM is to be selected with which publication and transmittal options for transfer.

For this purpose, the publication dialog is displayed.

Proceed as follows

1.   Select the PROOM folder, into which you want to transfer the data.
You can select project spaces and folders.

2.   Select the transmittal type.

3.   Select the desired options, as described below.
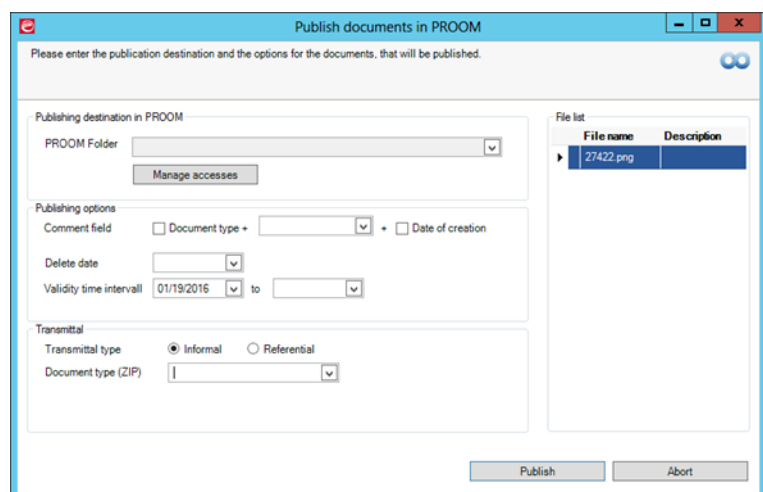
4.   Confirm the transfer with the <**Publish**> button.

The files listed in the publication dialog are now uploaded into the selected PROOM folder. The transfer is then finished.

Options and selection possibilities in the publication dialog

The following settings can be made in the publication dialog:

1. **PROOM folder:**
    Via the selection list of this field, you
    specify the folder/project space in
    which the files are to be published.

    PROOM accesses have the icon ∞,
    project spaces have the icon 🔘,
   folders have the icon 📁.

2. **Manage accesses:**
    If required, you can configure multiple accesses to different PROOM project
    spaces. This is done via the button <**Manage accesses**> and is described in the
    following chapter "[Manage PROOM access](#)".

3. **Comment field   :**
    With this field you can transfer
    information into the comment field
    of PROOM.
    You can select the document type, a
    field from the document description
    and the document date.
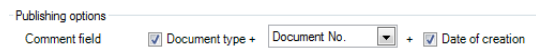
⇒   The result of your selection can be seen in the file list in the column "Description".

4. **Delete date:**
    The deletion date specifies the date at which the transferred files are automatically
    deleted in PROOM. If no date is specified, the files are not deleted.

5. **Validity time interval:**
    The time specified via the fields "**Validity time interval**" and "**to**" specify, from when
    and until when the PROOM users are allowed to see the files. At all other times,
    the files are invisible for the users – except the project space managed, who can
    always see them.

    After the expiry of this time, the files are not deleted but only become invisible.

    If the field "**to**" is not filled, the files are permanently visible.

    The time specified in "from" can be in the future. Example: With the validity range
    from 12/28/2019 to 01/03/2020 you can make the files visible only during the
    change to the next decade. The files are then visible from 12/28/2019 0.00 a.m.
    to 01/03/2020 11.59 p.m.

6. Reference type:
    Select via the radio button, whether the transmittal is a referential or informal transmittal.
    In the standard, "referential" must be selected.
    Detailed information on the transmittal type can be found in the previous chapter "Informal or referencing: What types of transmittal do exist?".

7. Document type (ZIP):
    This selection is only possible for informal transmittals. For informal transmittals, the status of the transferred files is frozen in a ZIP file and archived in PRO.FILE. The document type to be assigned to this ZIP file can be specified with this selection.

12.9   Dependent tab: Information on the sending

For each transmittal via which files are transferred into a PROOM project space, information on the transfer can be viewed in the dependent tabs "PRROM document data" and "PROOM data":

"PROOM document data"

This tab displays the following information:

1. The "**description**" as it is entered during the sending of the transmittal in the publication dialog.

2. The "**Start date of the transmission**" at which the upload of the file to the PROOM project space was started.

3. The "**End date of the transmission**" at which the upload of the file to the PROOM project sauce was finished.
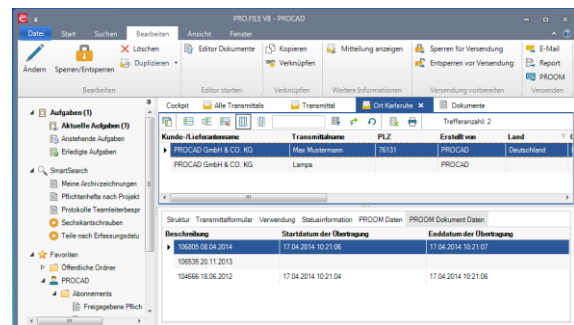
"PROOM Data"

This tab displays the transfer information entered in the publication dialog upon the upload if the file to PROOM:

| PROOM Document Data | Status information | PROOM Data | Browser | Transmittal |

PROOM Folder	Portal01\PRO.FILE - PROOM
Document type	checked
Document field	
Document date	
Delete date	
Valid from	02/02/2012 00:00:00
Valid to	
Transmittal type	informal
Document type (ZIP)	Zusatzdatei
State	created
Start date of job	
End date of job	

1. Into which "**PROOM folder**" has the file been uploaded?

2. Was the "**Document type**" indicated in the comment field for the description?

3. Which "**Document field**" from the document description was used in the comment field for the description of the transfer?

4. Was the "**Document date**" used in the comment field for the description?

5. Was a "**Delete date**" assigned, at which the transferred files are to be deleted in PROOM?

6. "**Valid from**": From which date on are the files visible in PROOM?

7. "**Valid to**": Until which date are the files in PROOM displayed? (After expiry of this date, the files become invisible and can only be accessed by the project space manager.

8. Which "**Transmittal type**" was used (informal or referential)?

9. If the transmittal type is "**Informal**" the transferred files are archived as ZIP file in PRO.FILE. Under which "Document type (ZIP)" is this file archived?

10. Which "**Status**" does the transmittal have?

11. At which **"Start date of job**" has the upload of the files to PROOM been started?

12. At which "**End date of job**" has the upload of the files to PROOM been successfully been finished? (For very large files, the start and end date may be different. The end date always shows the successful finish of the order).

12.10   Manage PROOM access

In the publication dialog for the upload of files from PRO.FILE to PROOM project spaces you can manage your PROOM access.

This can be done via the button <**Manage access**>.

A click on the button opens the windows for the access management.

To configure a new PROOM access, Proceed as follows

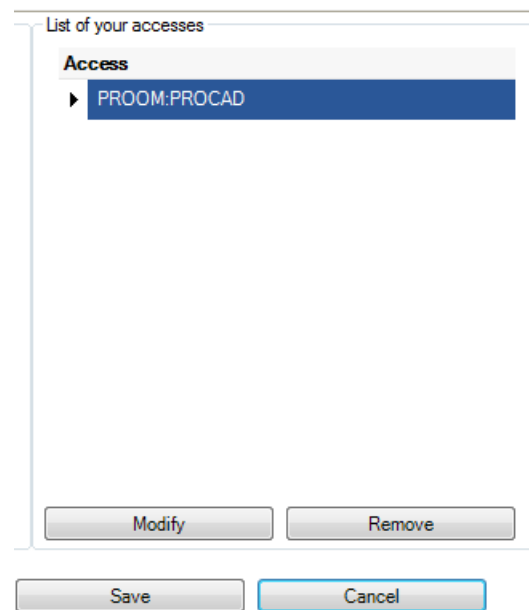1. Select the desired PROOM access in the field "Name of access".

Note:

Direct accesses to PROOM can only be created by the administrator in the PRO.FILE database.

2. By selecting the access, the field "**URL**" is filled automatically.

3. Enter your login name for the selected PROOM access in the field "**Login name**".

4. Verify your login by entering your "**Password**" in the field of the same name.

5. Via the button <**Test**> you can check whether the access data has been entered correctly and access is thus possible.

6. Confirm your entries via the button <**Transfer to list**>.

7. If the new access is displayed in the "**List of accesses**", you can use it in the future for data transfers.

8. Finish your access management changes with the button <**Save**>.

Changing an existing PROOM access

1. To modify one of your existing PROOM accesses select it in the "**List of your accesses**".

2. Click on the <**Modify**> button.

3. Change the access name, login name or password – as required.

4. Confirm your entries via the button <**Save**>.

Deleting an existing PROOM access

1. To delete on of your existing PROOM accesses select it in the "**List of accesses**".

2. Click on the button <**Remove**>.

3. The access is permanently deleted and removed from the list of accesses.

> **Attention:**
>
> A deleted access cannot be restored. If you have deleted an access by accident, you have to create it anew.

13   Optional: The PROOM Integration in PRO.FILE

Note: Licenses for PROOM required

To use the PROOM integration in PRO.FILE, you need a PROOM Enterprise License.

PROOM is a Cloud solution for the document exchange in technical comoanies – it is used for the simple and secure exchange of files with partners, cusomters and suppliers. PROOM uses modern, cloud-based project rooms with permission and access control.

See the chapters:

- Settings for the PROOM access
- Upload documents from PRO.FILE to PROOM
- Create PROOM folder during file upload
- Download files from PROOM to PRO.FILE
- Start the PROOM Web UI

13.1   Settings for the PROOM access

A user can have access to different PROOM project rooms. In order for the data exchange via the PROOM integration in PRO.FILE to be accessible, the access to these project rooms has to be configured in a first step via the login data of the user.

See the following chapters:

- Initial settings for the PROOM access
- Change the settings for the PROOM access

13.1.1   Initial settings for the PROOM access

To use the PROOM integration in PRO.FILE, the access to the project rooms you are authorized for has to be configured.

Function call:

"Tab "**PROOM**" => "**Area PROOM**" => Function "**Settings**"

Proceed as
follows

1. Select the function "Settings" from the "PROOM" tab.

2. Enter your login data for PROOM in the following dialog.

- **Access:**
  From the dropdown list, select the PROOM access you want to use.

Note

The available access options are provided by your PRO.FILE administrator in the PRO.FILE Management Console.

- **URL:**
  The URL of the the selected PROOM access is entered automatically.

- **Login name:**
  User name (e-mail address) for the login to the selected PROOM project room.

- **Password:**
  The password for the login to the selected PROOM project room.

3. Click on the button <**Test**> to check whether your access data is correct.

⇒ If the access data is correct proceed with the next step.

4. Click on <**Transfer to list**>

⇒ The selected access is shown in the list of configured accesses.

- To add an additional access to a PROOM project room repeat the above steps.

⇒ Access to a PROOM project room is now configured.

For the adjustment of the access data, see the following chapter "Change the settings for the PROOM access".

13.1.2 Change the settings for the PROOM access

The exchange of data between PRO.FILE and PROOM via the PROOM integration is made based on the configured accesses to the user's PROOM project rooms.

To change these settings Proceed as follows

1. Select the function "Settings" from the "PROOM" tab.

2. Select the access entry to be changed from the "List of your accesses".
3. Click on the button <**Modify**>.
⇒ The access data is now displayed in the left-hand area of the window.
4. Make the desired adjustments to the specified information.
5. Confirm you changes via the button <**Transfer to list** >.

The changing of your access settings is thus completed.

13.2 Upload documents from PRO.FILE to PROOM

Documents from PRO.FILE can be transferred to PROOM for the secure exchange with business partners, customers and suppliers within a PROOM project room.

The user can upload one or more unstructured documents from PRO.FILE to a PROOM project room. The user needs the corresponding permissions for this in PROOM.

	Function call:
	"Tab "**PROOM**" => "**Area PROOM**" => "**Uplaod**"

For the upload of documents from PRO.FILE to a PROOM project room Proceed as follows

1. Select the document you want to upload to PROOM from a list in PRO.FILE.

2. Select the function "Upload" from the "PROOM" tab.

3. In the following list, select the target folder within the project room in PROOM.

4. Confirm you selection with <**Upload**>.
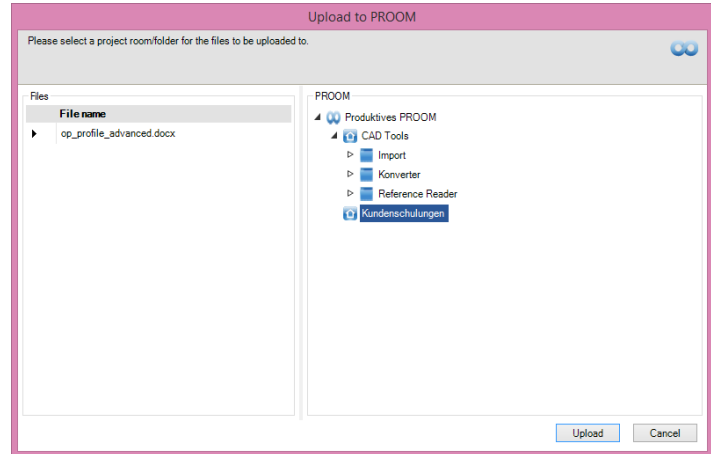
⇒   The upload of the files from PRO.FILE to PROOM is started.

⇒   The dialog window remains open until all files are transferred.

13.3   Create PROOM folder during file upload

You can create a new folder immediately when uploading files to PROOM.

Proceed as follows

1. Opemn the selection window for the transfer of files.

2. Click on the folder you want to create a sub-folder for.

3. Click on the button <**Create PROOM folder**>.

4. Enter a name for the PROOM folder. There must not be any other folder of the same name.

5. Click <**OK**>.

⇒   A new folder is created in PROOM.

6. By double-clicking the new folder, the folder is selected as target location for the files to be uploaded.

13.4   Download files from PROOM to PRO.FILE

Via the PROOM integration in PRO.FILE the user can select several documents in a PROOM project room and transfer them to PRO.FILE.

Function call::

Tab "**PROOM**" => "**Area PROOM**" => Function "**Download**"

Proceed as follows

1. Select the function "Download" from the "PROOM" tab.

2. Select the desired PROOM project room.

3. Select the files in PROOM to be saved to PRO.FILE.

4. Click on <**Download**>.
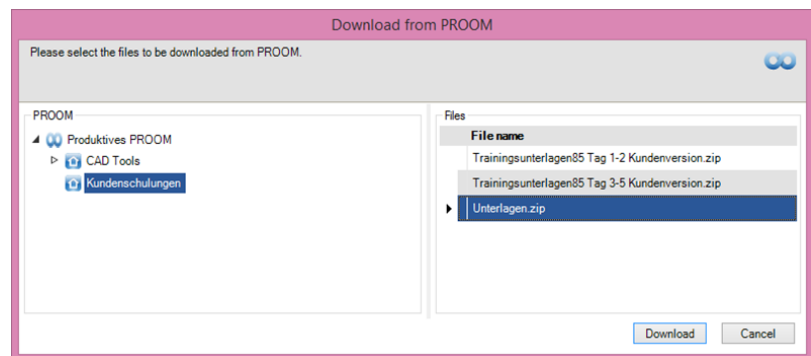
⇒   For each selected file, the PRO.FILE Checkin wizard for the creation of a new document description is started.

13.5   Start the PROOM Web UI

The Web UI of the configured PROOM project rooms can be accessed directly from PRO.FILE.

Function call:

Tab "**PROOM**" => "**Area PROOM**" => Function "**PROOM**"

Proceed as follows

1. Select the function "PROOM" from the "PROOM" tab

2. If access is configured for several PROOM project rooms, you can select the desired project room and confirm your selection with <**OK**>.

⇒ The PROOM Web UI is displayed in your web browser.

14   Annex: Update of the PRO.FILE WindowsClients

PRO.FILE update via AutoUpdate

The PRO.FILE installation is often updated while operations in PRO.FILE are still being carried out by some users.

For various reasons, it may happen that, despite silent deployment, some client computers cannot be updated. For such situations you can configure the AutoUpdate for PRO.FILE users. In this case, the user gets the opportunity to trigger a PRO.FILE update via the corresponding button:

PRO.FILE V8

The conversion status expected by PRO.FILE is 8.60.0.363. The current conversion status of the database is 8.60.0.382.
PRO.FILE can run.
PRO.FILE must be updated.

☐ Don't show this message again

OK   Update   Cancel
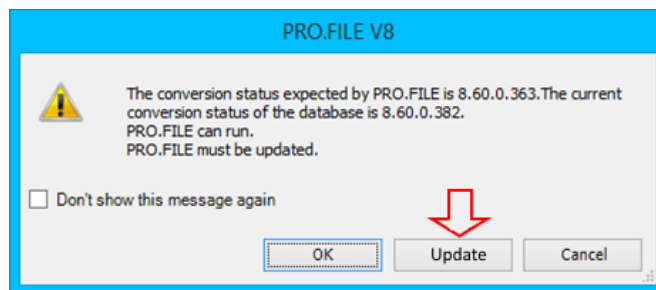
For the update of your PRO.FILE Windows Client installation proceed as follows

1. In the window above, click on the button <**Update**>.

2. The program ProfileUpdate.exe is started and PRO.FILE is closed to perform the update.

3. The PRO.FILE update program shows a message that all running programs should be closed.

4. The update script is started.

5. When the update is completed, the program shows a message that the computer should be restarted.

The update of the PRO.FILE Windows Client is thus completed.

Note: Permissions

For the running of the update script the user need administrator permissions. For this reason, PRO.FILE checks whether the user has this permission. If the user does not have the required permissions, the button <**Update**> is not displayed. In this case, please contact your administrator.

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