Operation PRO.FILE for Beginners

PRO.FILE Release 8.7
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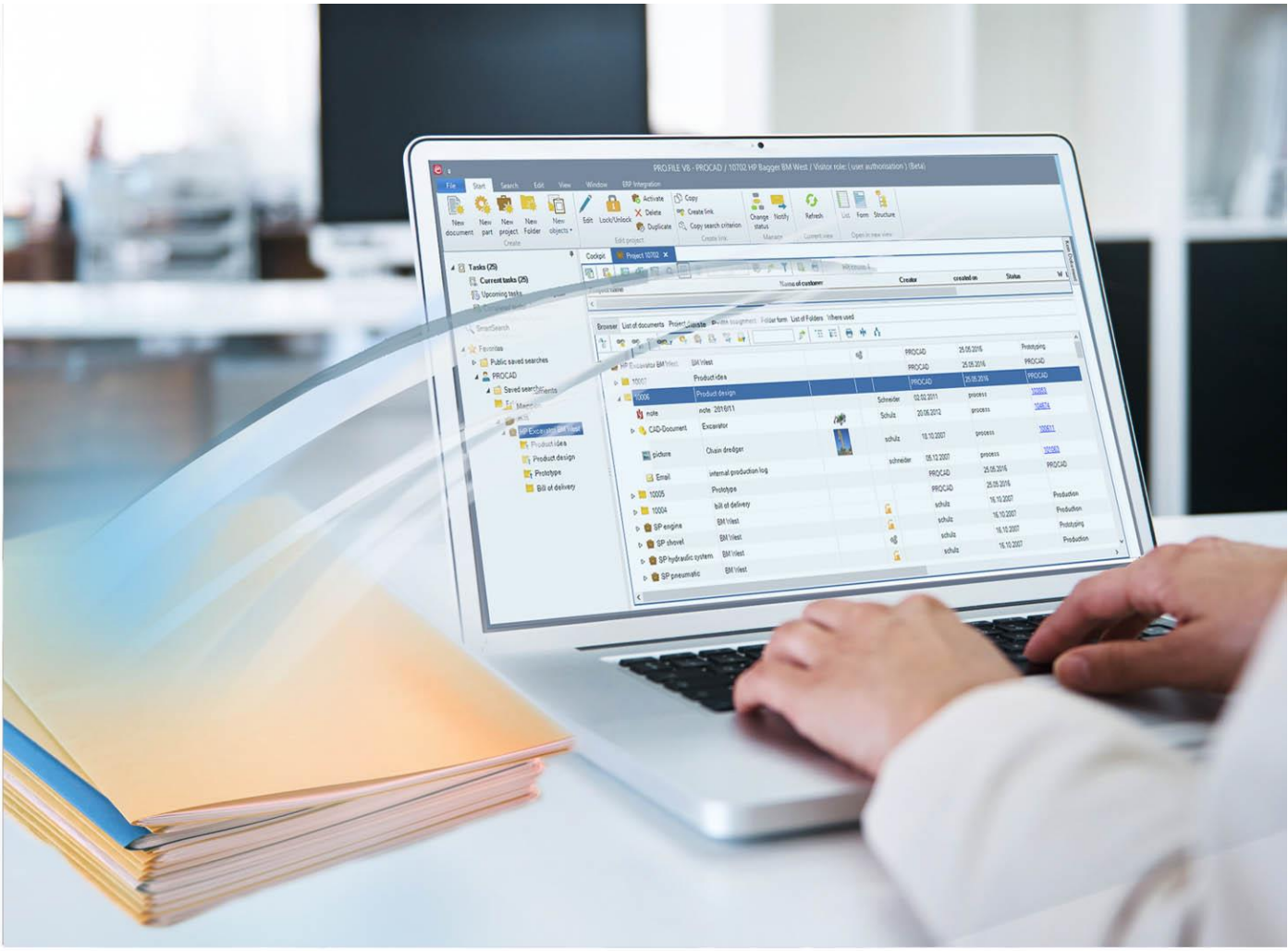

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About this manual

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

Step-by-step instructions:

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 for Beginners: Search, Find and open

This chapter is a basic course for users who might be taking their first steps with PRO.FILE or who have a limited knowledge of how to use the EDM/PDM system PRO.FILE.

This manual is to give you a quick introduction into the operation of PRO.FILE and to provide answers to the question:

How to search, find and open?

Therefore the basic functions of PRO.FILE are listed in the following chapters:

- Step 1: How to start PRO.FILE?
- Step 2: How to start the PRO.FILE search?
- Step 3: Search result – get the information
- Step 4: How to open document files?
- Step 5: How to exit PRO.FILE

You want to know how to use PRO.FILE with tips and tricks? See the following chapters:

- Tip 1: Use the list functions
- Tip 2: Customize the GUI to your needs
- Tip 3: Save your searches
- Tip 4: Export the contents of lists and browser displays to Excel

More information and overviews for a better understanding can be found in the last chapters:

- More information to look up
- The dependent tabs in PRO.FILE
- The buttons – an overview

For further information on PRO.FILE and detailed descriptions please refer to the Manual "PRO.FILE for Advanced".

Note: Everything installed?

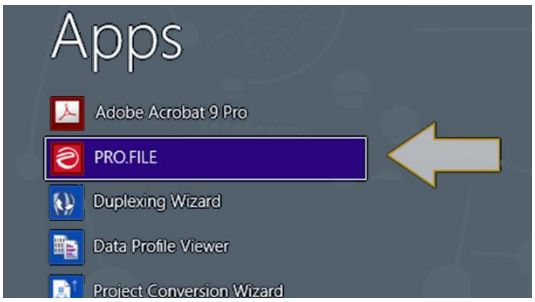
In order for you to be able to follow the instructions of this manual, PRO.FILE has to be installed on your workstation.

Should this not be the case, please contact your system administrator.

1.1 Step 1: How to start PRO.FILE?

You can start PRO.FILE in two ways:

- Via the Windows start menu "**Start**" => "**All Programs**" -> "**PROCAD**" -> "**PRO.FILE**" or via Apps sorted by name => "**PRO.FILE**"



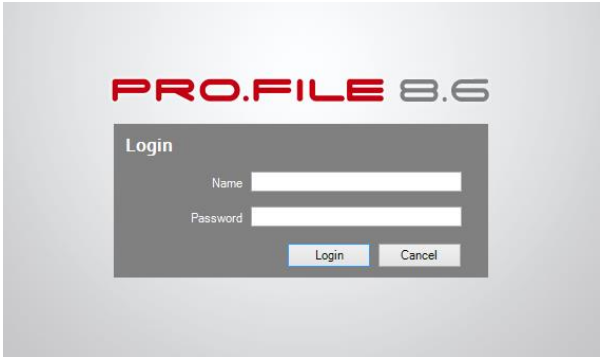
- By double-clicking the PRO.FILE icon on your desktop.

⇒ Once the application starts, the PRO.FILE login-mask appears.

Login

When you start PRO.FILE you will be asked to enter your login data.

1. Enter your user name in the field "user" in the PRO.FILE Login Mask.
2. Click or use TAB for the field "**password**". Enter your password.
3. Confirm your entries with **<Login>** or return.



⇒ The PRO.FILE Cockpit is displayed.

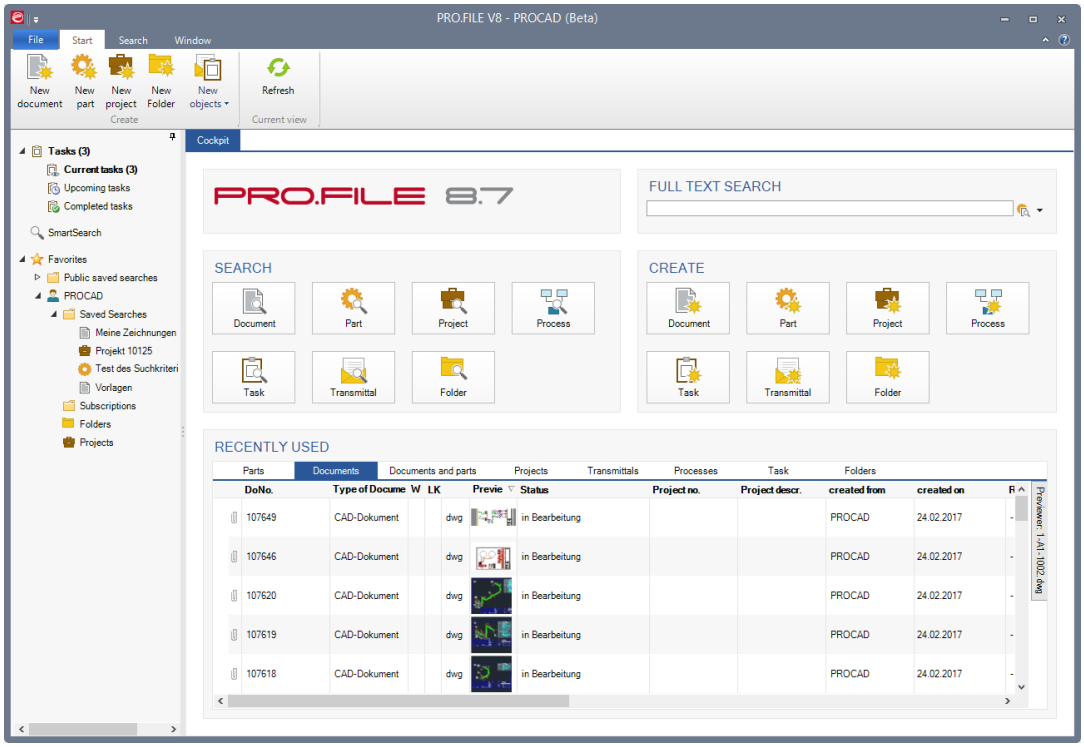
Note: Windows auto start feature

If no PRO.FILE login window appears when you start PRO.FILE, and the PRO.FILE Cockpit is displayed immediately instead, this means the auto start function is activated on your workstation.

- This means that for the login of a user in PRO.FILE, the user name from Windows will be used.
- An additional registration is not necessary. You can start now straight away to work in PRO.FILE.

1.2 The PRO.FILE Cockpit

If you started PRO.FILE successfully in the above described way, the PRO.FILE GUI appears on your display.



Note: The Cockpit can be configured

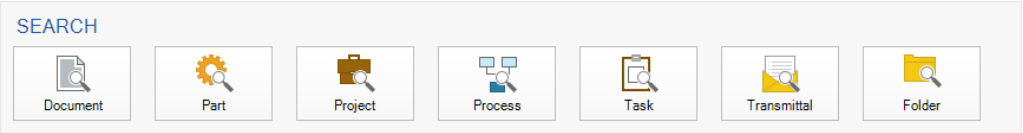
The distribution and position of "Widgets" in the PRO.FILE Cockpit can be configured. The descriptions in this manual may therefore differ from the situation on your computer. For further information see the manual "PRO.FILE for Advanced".

The Cockpit is your starting point for the working with PRO.FILE. It offers quick access to all important functions.

The PRO.FILE Cockpit offers three different options for the quick access to data:

- Search:

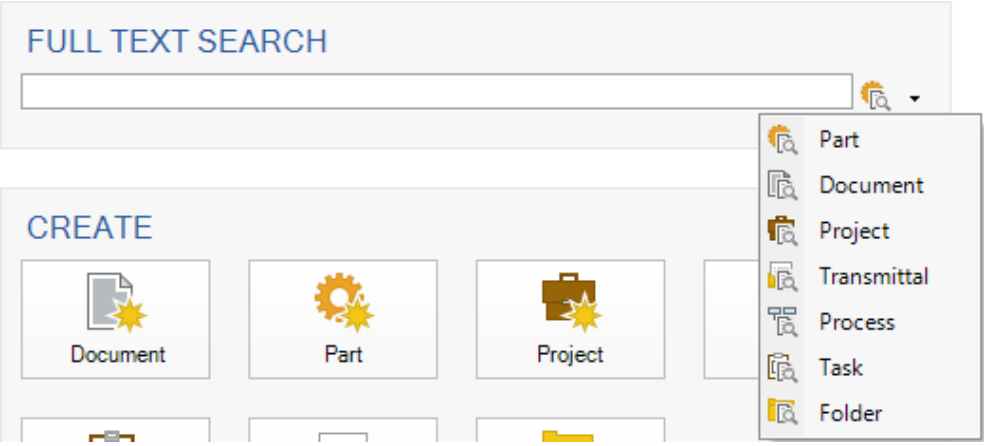
  In order to access data records and to display them in PRO.FILE, a selection has to be made. This selection can be made by clicking the corresponding icons in the section "Search" in the PRO.FILE Cockpit.



These functions can also be found in the "Search" menu in the PRO.FILE ribbon.

- Full-text search:

  The input field "Full text search" in the upper right area of the Cockpit allows you to search the document descriptions as well as the attached files or other records (parts, projects, transmittals, processes, tasks) 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 objects you want to search in.



The, click on the corresponding icon and <Enter> in order to start the full-text search.

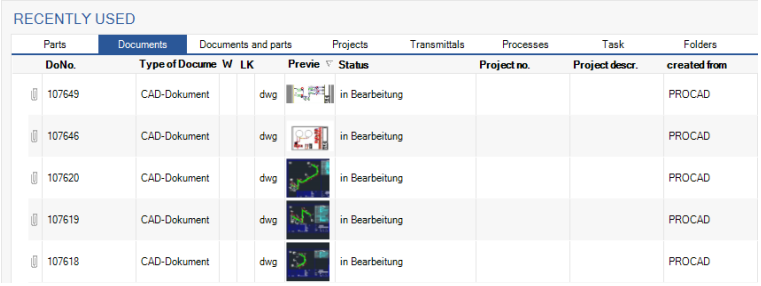
Note: Full-text search needs to be configured

If you want to use this function, the full-text search has to be configured by your administrator!

- Accessing recently used objects:

  You can find a list of recently used objects in the lower area of the Cockpit.

  - You can use the various tabs to select the object type that you want listed:



  - The list will always contain the last 30 objects that were 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 display and editing options.

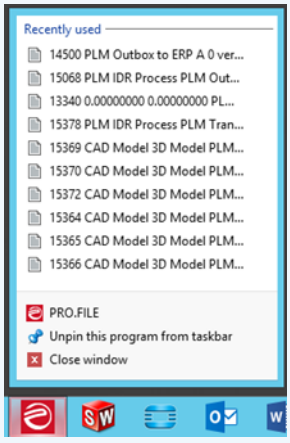
This Cockpit will always remain open, even after further list, form or browser views were activated, and can be accessed via the "Cockpit" tab.

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.



1.3 Overview: the elements of the PRO.FILE window

The following elements of the PRO.FILE window will be described in the following chapters:

- The title bar
- The register tabs
- The menu ribbon of PRO.FILE

1.3.1 The title bar

The title bar contains different types of information that are dependent on your system configuration.

In the standard installation, the PRO.FILE title bar includes:

- The name of the logged in user:

  In this example "PROCAD". All actions in PRO.FILE are then carried out with the access authority and rights that the user has been assigned. All changes that are carried out are protocolled in this login.

- Information on the actual activated project.

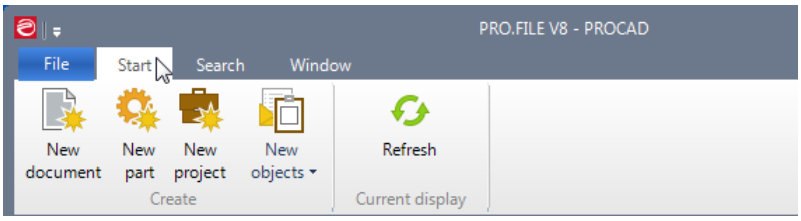
  This activated project will have all of the created data assigned to it. If there is no project active, the space in the title bar remains empty.

- The role of the PRO.FILE registered user within the project.

  Via the project role, the user access authorities and rights are set for the active project.

1.3.2 The register tabs

The register tabs make the necessary menus and functions therein available to you.



Each menu shows the corresponding groups of functions when the tab is selected.

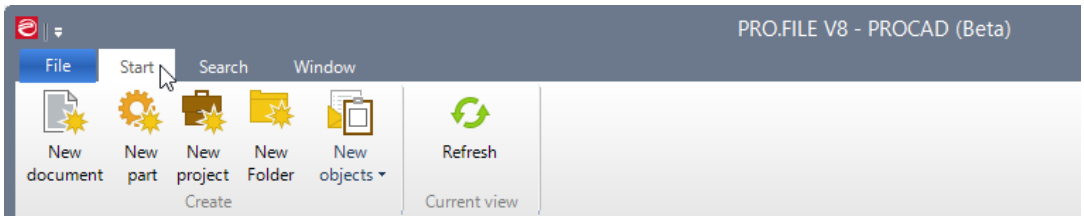
Furthermore, a context menu is always available within the PRO.FILE GUI that can be accessed via a right mouse click. This context menu largely is the same as the "Edit" menu

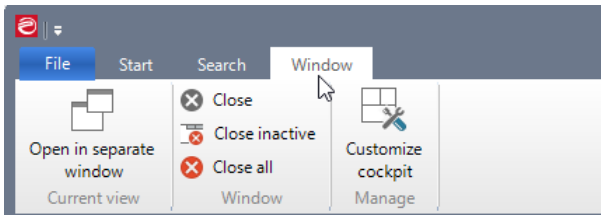
Context-sensitive menus

The PRO.FILE menus as well as the individually available menu items are context-sensitive: this means that PRO.FILE will always provide you with those functions that fit the currently active object. This means that the editing functions that appear for an active part are different from those that appear for an active document. The affected menus will also change if an object is displayed in a list or a form view.

1.3.3 The menu ribbon of PRO.FILE

The ribbons of the selected tabs make the most important functions directly available.





- By using the icons, the required functions can be accessed. The selection occurs through simple mouse click with the left mouse button.
- When the mouse arrow is moved over an icon, a tool-tip appears to explain what function is carried out by clicking on the icon.

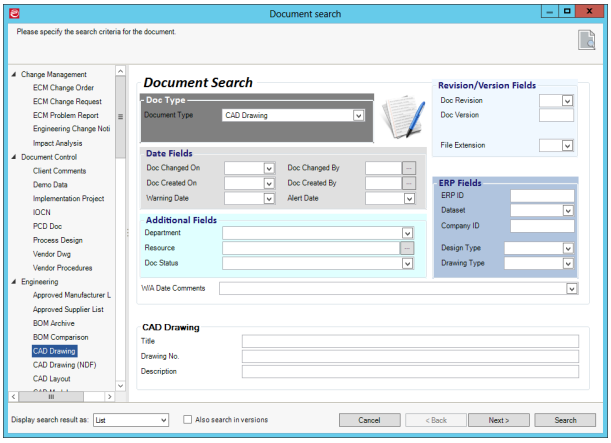
2 Step 2: How to start the PRO.FILE search?

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.

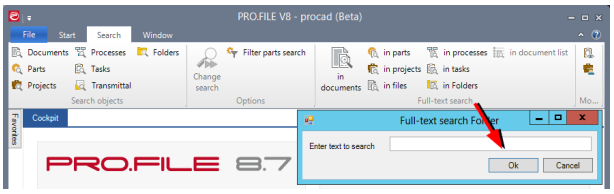
  Please also refer to chapter "Searches using the search form".



- Possibility 2: full-text search

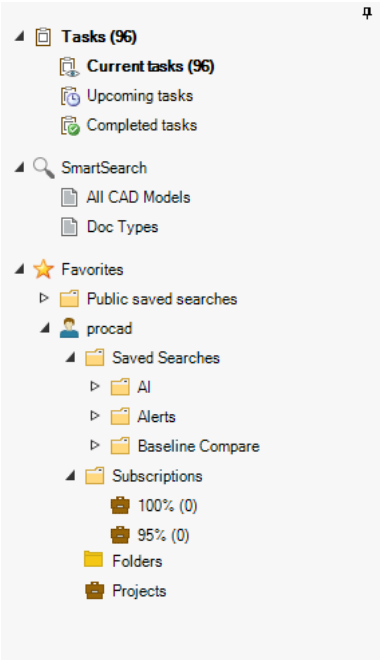
  Full-text search allows users to search for keywords or strings that can be found either in the object description or even in the attached files (of document descriptions) on the file server.

Please also refer to chapter "The "Full-text search".



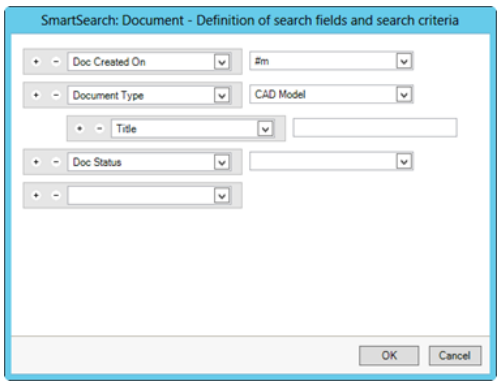
- Possibility 3: the Favorites and subscriptions:

  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. Please refer to chapter "Tip 3: Save your searches".



- Possibility 4: the SmartSearch:

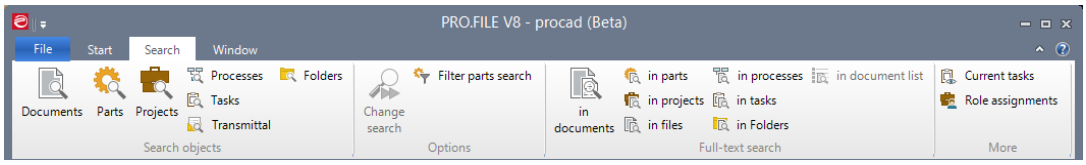
  A SmartSearch is a search form that only features the desired number of fields which drastically reduces complexity. A SmartSearch will only contain those fields that the user needs for a specific search. Please refer to chapter "SmartSearch".



For detailed information on the utilization please refer to the chapters mentioned above.

2.1 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 via the "Search" tab.



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

Note:

The selection possibilities for documents are controlled and protected by the administration of access rights.

When a document, part or project is in a status, in which it may not be displayed due to the users status permissions, it will also not be found by the search.

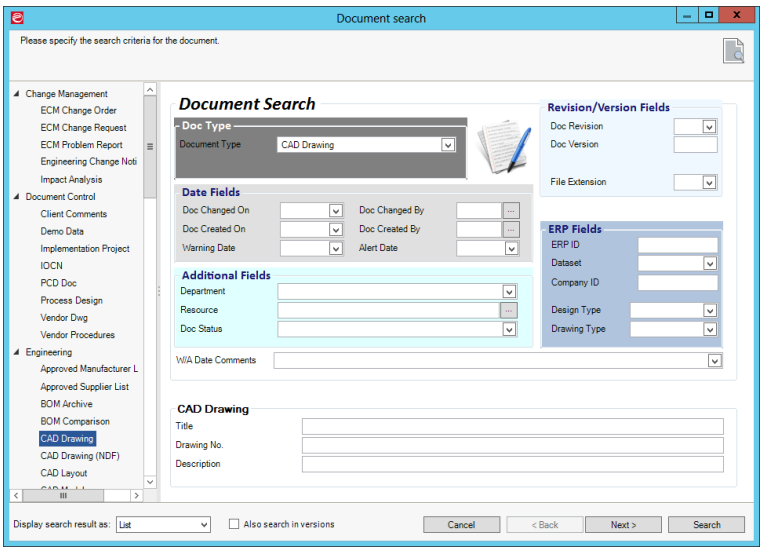
2.1.1 Start searching using the search form

If you want to search PRO.FILE for specific objects you can choose between different possibilities that can be accessed through the "Search" menu.

Function call:

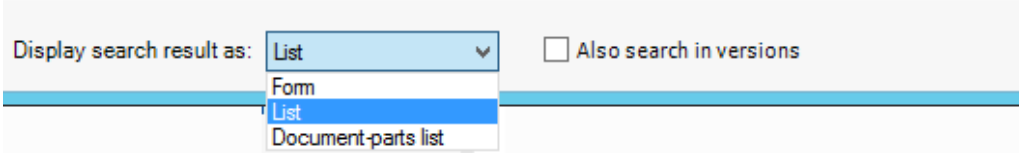
"Search" => Group "Search objects" => "..."

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



Display results in form or list view?

2. 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:



Search in versions?

3. 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).

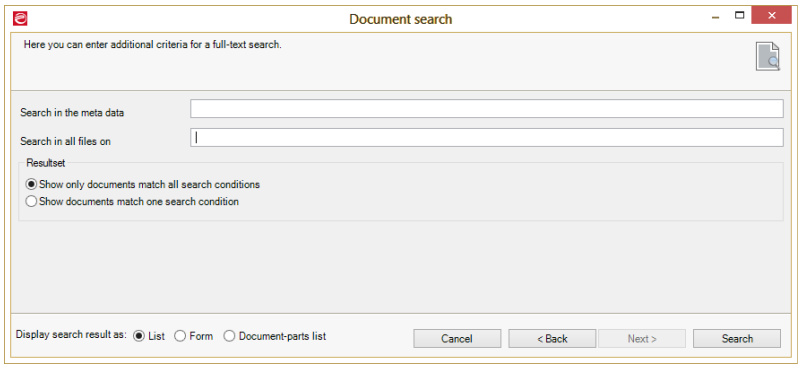
Specific search options for categories

4. 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.

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

5. Via the button **<Next>** you can combine your search form with a full-text search. The input for the full-text search is connected to the input for the search form by an "AND"-connection. For more information see "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 in a new tab. The title of the tab and the corresponding tooltip contain reflect the search criteria.

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 "Placeholders / wildcards for the search"

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 document types
- Search for specific item characteristics

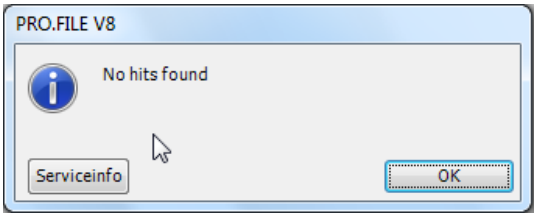
Successful search: If data records match the search pattern, they are displayed, according to command call,

- in list display
- in form display, where the first of the data records found is displayed in the form

The icon allows the user to switch from form view to list view and vice versa.

Unsuccessful search: If no data record matches the search, the following information dialog box will be displayed:

The search form is then displayed again and new search criteria can be typed in.



2.1.2 Search for specific document types

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

This facilitates the search for the document types.

Note:

A document description in PRO.FILE always consists of two parts: the fixed document description and the variable document description.

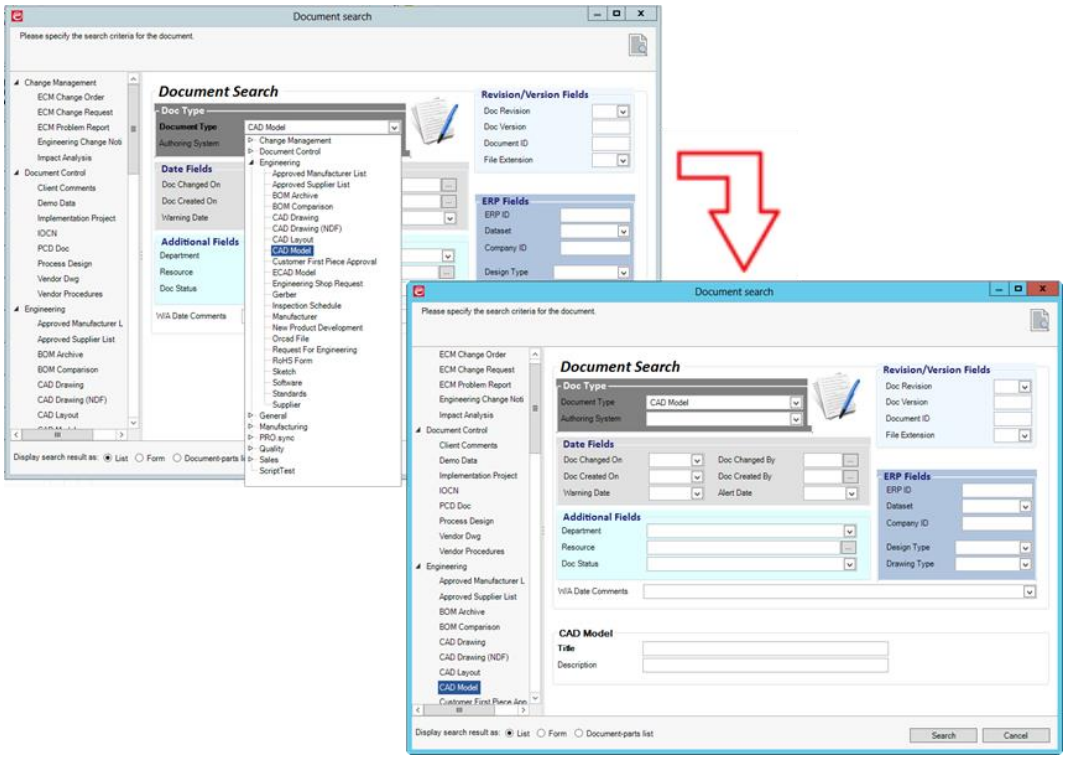
- The fixed document description is identical for all documents in the database.
- The variable document description varies depending on the type of document that is selected.

  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:



2.1.3 Search for specific item characteristics

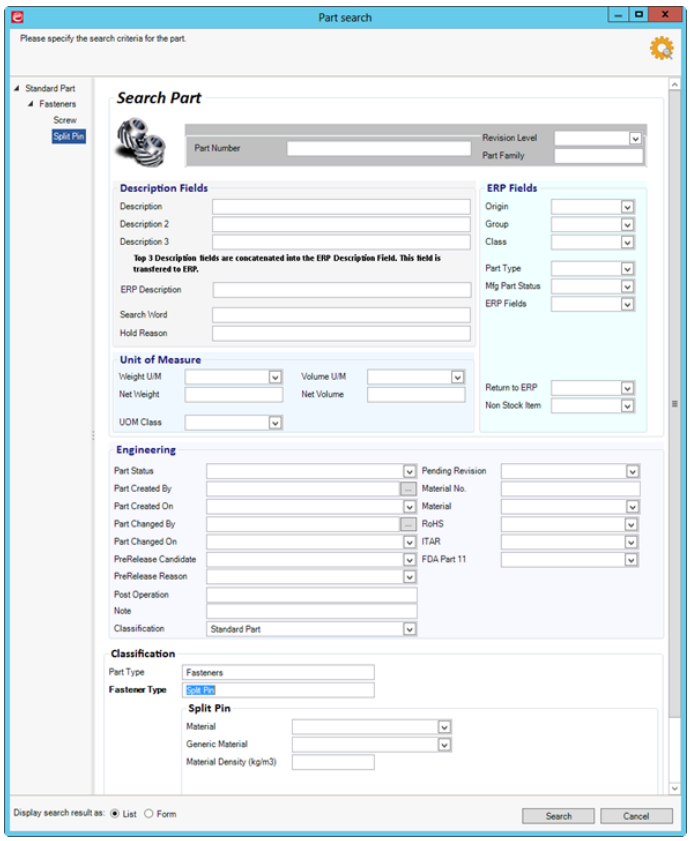
If the search for parts is opened using the function "Search" => "Parts" the search form for parts will be displayed.

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 item class list.

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



2.1.4 Narrow down a search result

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 from the "Search" menu:

- Clicking this icon will reopen the search that was made for the active window. This search form 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 selection criteria will now be used for the data records.

Note:

The function "Change search" is not available for the tab "Newly created documents" in order for this list to remain unchanged. When new documents are created, the list is enhanced after the check-in wizard is done.

2.1.5 Placeholders / wildcards for the search

For entering criteria the following wildcards are possible:

*	replaces several symbols
?	replaces one symbol
<	smaller than (only for float fields)
>	greater than (only for float fields)
<=	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*[*]*

- Entering "!" at the start of a search text makes PRO.FILE carry out a search, and show all results except those containing the text that follows the exclamation mark. (Example: "!Text1" will find all descriptions except those containing "Text1").
- Entering "||" into the search text separates two phrases and presents the results that either contain the first or the second phrase (Example: The entry "Text1||Text2", finds all entries containing "Text1" or "Text2").

2.2 The "Full-text search"

Via the function "Full-text search in object", it is possible to search the object descriptions.

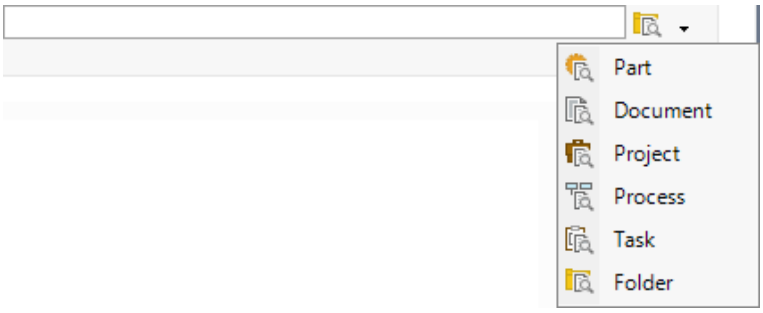
Note:

The full-text search needs to be configured in the PRO.FILE Management Console. Otherwise, a corresponding error message is displayed.

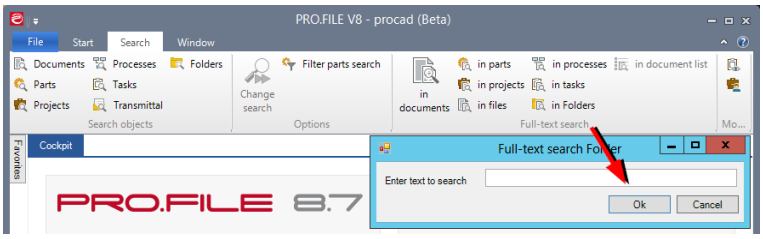
The full-text search can always be accessed from two points within PRO.FILE:

- from the PRO.FILE Cockpit:

  See the chapter "Start the full-text search from the PRO.FILE Cockpit"



- from the "Search" menu in the PRO.FILE ribbon bar.



Here the user is given separate access to the full-text search for parts, documents, projects, etc.

A detailed description can be found in the chapter "How do I start the full-text search from the "Search" tab?".

2.2.1 How do I start the full-text search from the "Search" tab?

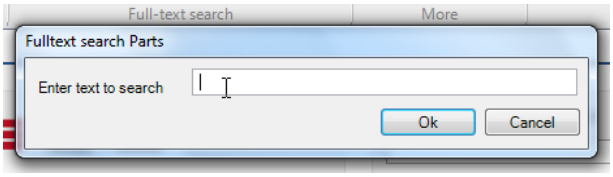
The full-text search in the PRO.FILE "Search" tab gives users an additional search mask in which the conditions for the text search can be determined.

Function call:

"Selection" => "Full-text search in objects"

After calling this function the following entry window will appear:

1. Enter the desired search text. You can use letters, numbers, characters and links.



Please also refer to chapter "Tips on using the "Full-text search" in documents and parts".

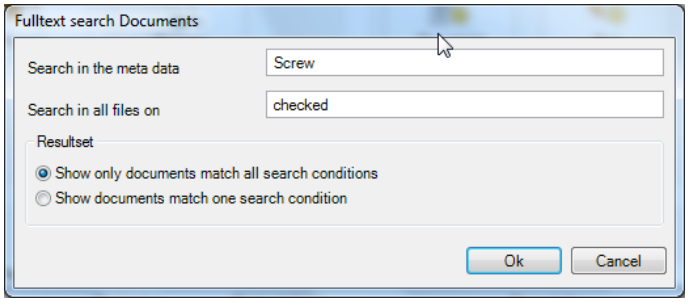
2. Confirm your entry by pressing the <OK> button.

⇒ 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. 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 metadata:** 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:

- Results 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 metadata 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 clicking <OK>.

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

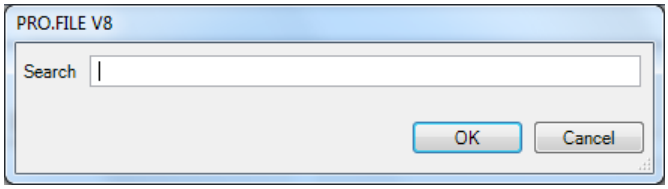
See also chapter "Tips on using the "Full-text search" in documents and parts" for further information.

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.

This is to make a pre-selection of files to be searched.

After calling this function the input mask for your search term is displayed:



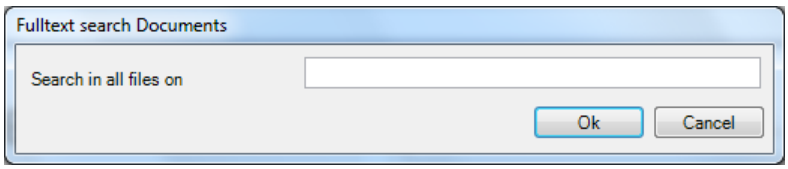
Full-text search in files

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.

After calling this function the input mask for your search term is displayed:



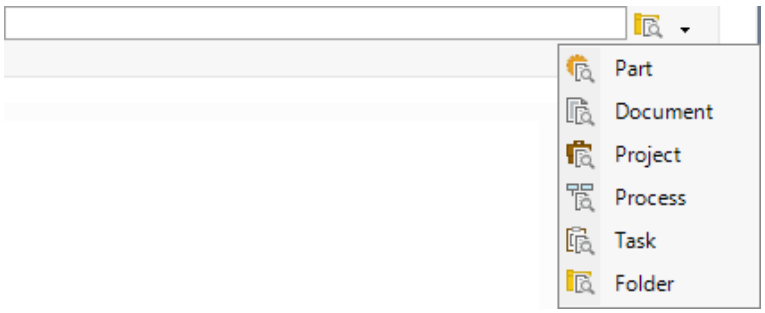
2.2.2 Start the full-text search from the PRO.FILE Cockpit

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 "Full-text search" in documents and parts".

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 (metadata) 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 , folders:

  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.

2.2.3 Tips on using the "Full-text search" in documents and parts

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.

Search for a word or word sequence:

If you are searching for a particular word, this word should be entered into the entry field. The word can also be entered in quotation marks, i.e. "X". 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:

- Mountain OR Hill

  Either mountain or hill must be present in the searched data.
- Mountain OR Hill

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

Wildcards/variable characters:

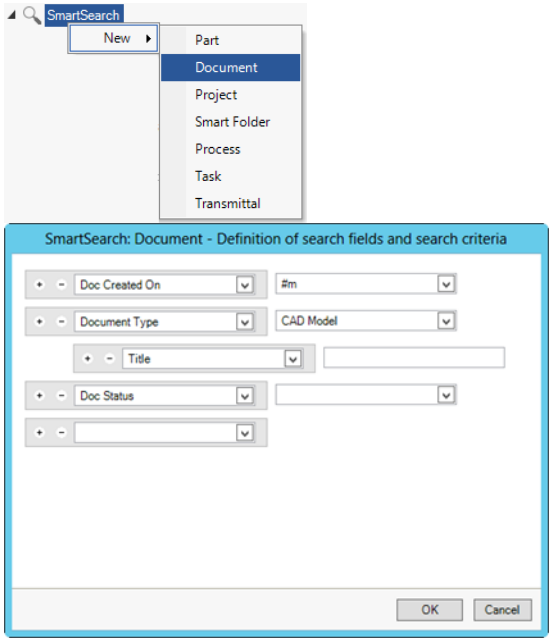
In contrast to the other PRO.FILE selection functions, when applying the selection function "Full text search in.." as a Wildcard/Variable character, only the character "*" is allowed.

"*" Stands for "random"

The placeholder "*" can only be used at the end of a word. At the beginning and in the middle of a string of characters, the asterisk is not evaluated as placeholder for the search.

2.3 SmartSearch

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 favorites and of those delivered by the search form.



Using SmartSearch you can define your own search form:

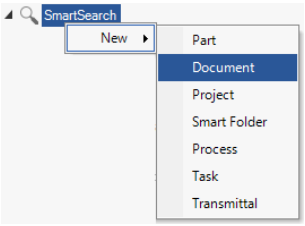
- A SmartSearch is a search form that can be set up to contain only the desired number of fields. Now, less fields have to be filled in which drastically reduces complexity.
- A SmartSearch can include predefined search fields with preset search parameters (like the saved serarch) as well as search fields 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, folders, processes, tasks and transmittals.

Details can be found in the following subchapters.

2.3.1 Create a new SmartSearch

Creating a new SmartSearch is very easy. Simply follow these instructions:

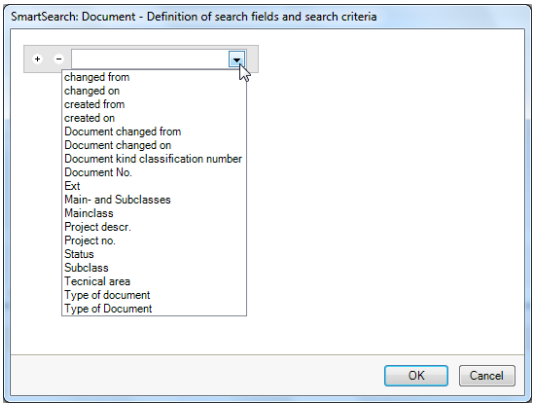
1. If you want to define a new SmartSearch that will remain available to you, please mark the list item SmartSearch that can be found above the list of favorites.



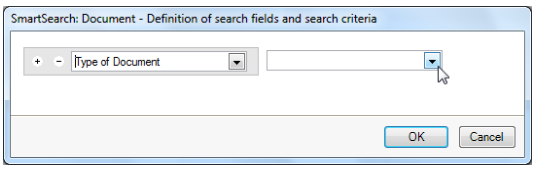
2. Then use the context menu of the right mouse button to access the function "New" for the desired object type.
   You can create a SmartSearch for parts, documents, projects, folders, processes, tasks or transmittals. Of course, there are different selection fields available for each object type.

⇒ A window will appear in which you can define the fields and field values that are to be used.

3. Use the drop down menu to select the first field you want to include in the SmartSearch.



⇒ 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.

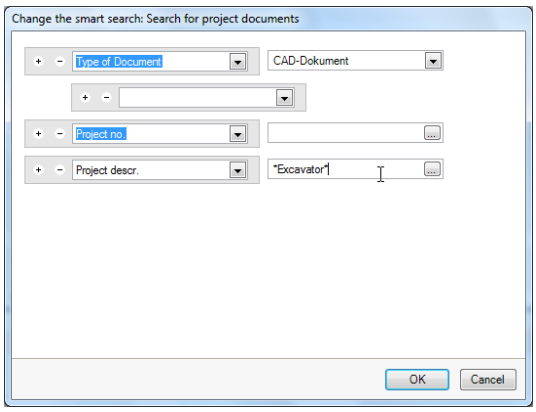


⇒ If any selections are defined for this field these are available through the icon for the entry of the field value.

⇒ For category fields, the category selection can be accessed via the corresponding icon.

4. If all fields of a structure level are already configured in the SmartSearch, no new fields can be added through the + icon.

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

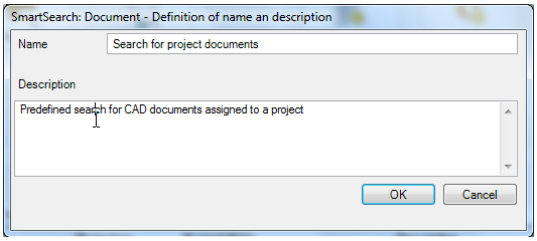


⇒ Preset fields can be overwritten at any time when later executing a SmartSearch.

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.

⇒ Another input mask will appear:

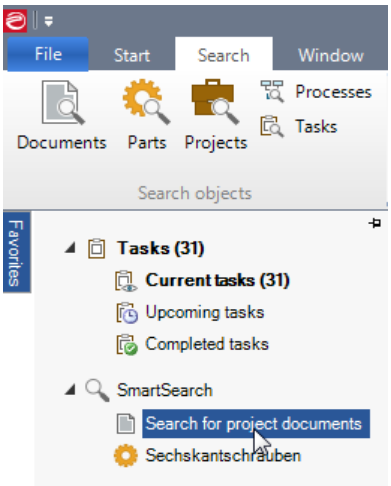
7. Now you have to specify a name for this SmartSearch. You can also add a description of the SmartSearch.



8. Save your input via the <OK> button.

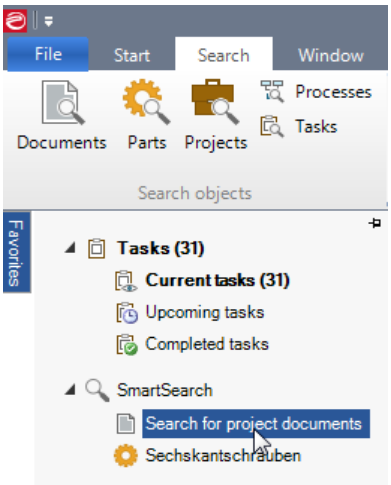
⇒ The respective SmartSearch will then be available to you in the upper section of the PRO.FILE favorites bar:

⇒ A SmartSearch can now be accessed by double-clicking the desired SmartSearch entry in the list.



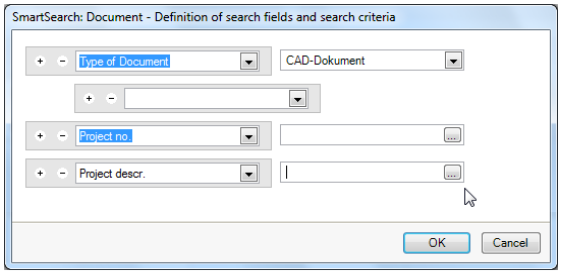
2.3.2 Access an existing SmartSearch

SmartSearches are displayed as an independent branch above the favorites:



1. 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 this example:



- 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.

2. 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").
3. 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.

4. 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.

2.3.3 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:

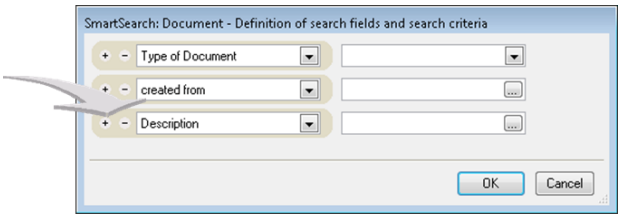
However, there are two ways to use these added fields in the SmartSearch:

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.

In order to add one or more fields for the search at hand simply follow these steps:

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.



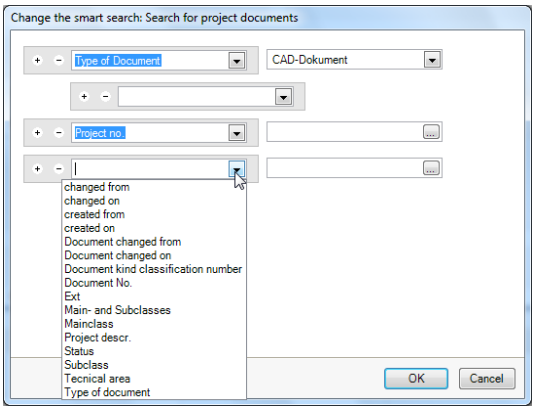
Note:

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.

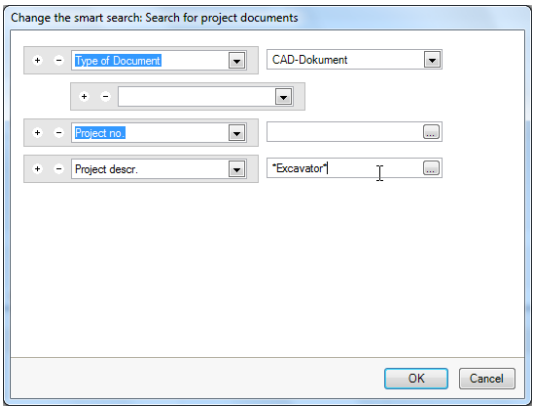
⇒ An empty field will appear.

3. 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.

4. You can now enter the corresponding search criteria:



5. You can now add further fields by following this procedure.
6. 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.

2.3.4 Note: Remove fields from the SmartSearch-form:

- 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.

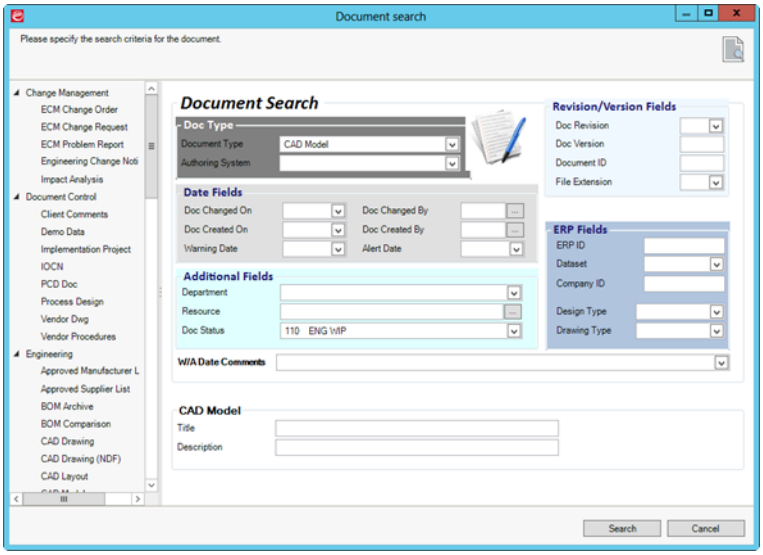
2.3.5 Transform a completed standard search into a SmartSearch

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.

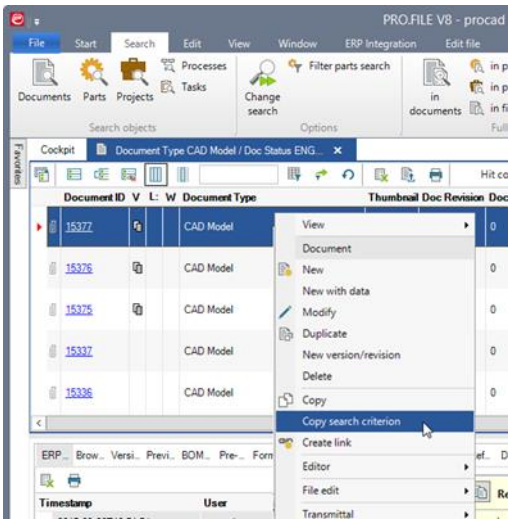
Proceed as follows

1. Start a search and enter the the desired search criteria into the search form. (Please refer to chapter "Searches using the search form" for more information).



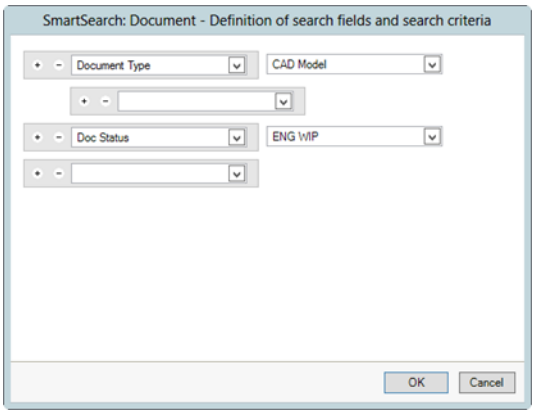
⇒ The results will be displayed in a tab within the PRO.FILE user interface.

2. Within this list of results, now select the function "Copy search criterion" 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" or "New" => "Document".

⇒ The stored search fields will now be automatically displayed in the SmartSearch.



Note:

The object type the SmartSearch is to be created for, has to be the same object type the search was made for. For example, if criteria for a search for documents were copied to the clipboard, they can only be used for a SmartSearch for documents. A SmartSearch for parts can only be automatically created if the stored criteria were for parts as well.

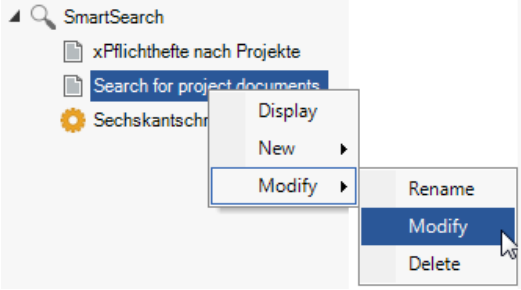
4. This predefined SmartSearch can now, if required, be adjusted, abridged, or extended. It is also possible to include preset values.
5. The creation is then confirmed and stored by pressing the <OK> button.

⇒ 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.

2.3.6 Permanently change an existing SmartSearch

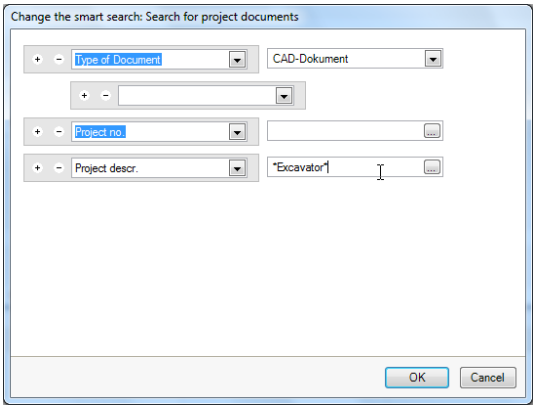
In order to permanently change a SmartSearch, simply follow the instructions below:

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".



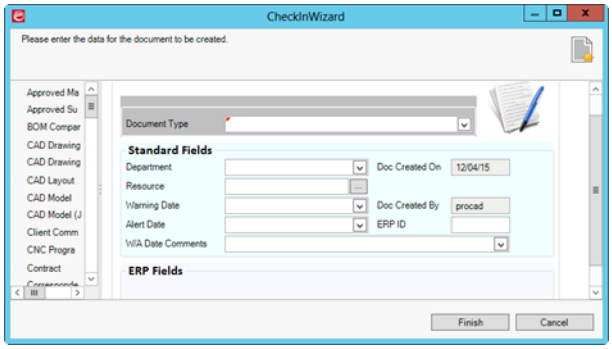
4. Once you have completed all changes store the SmartSearch using the <OK> button.

⇒ The changes will be stored and will be available to you every time you access this SmartSearch.

2.4 Enter data in PRO.FILE

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 used for selecting data records, creating data records, and editing data records.



There are several types of fields

Form fields

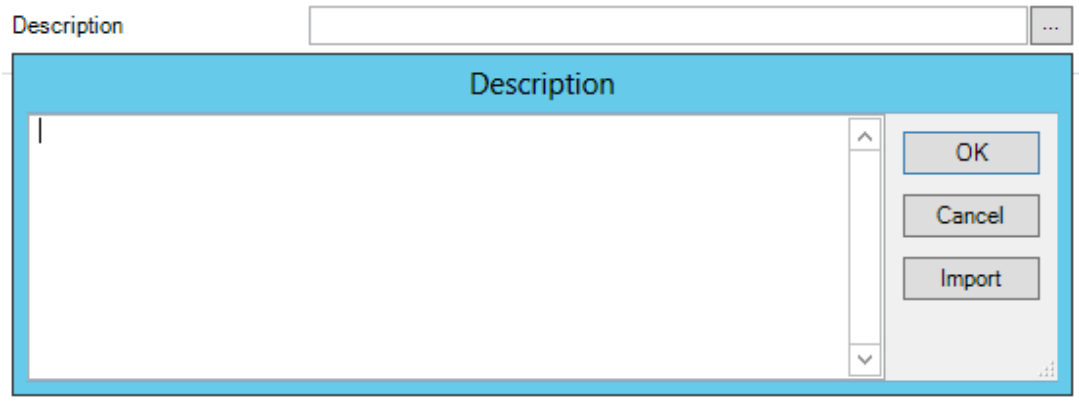
The simplest element for the entry of data is the form field:

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

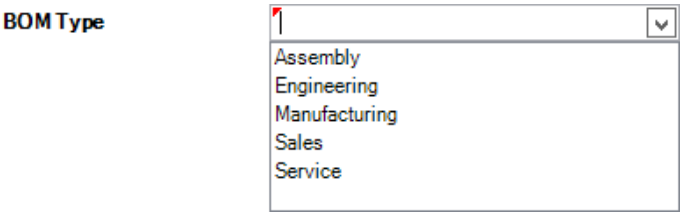
Multi-line fields provide unlimited space for unformatted text input.



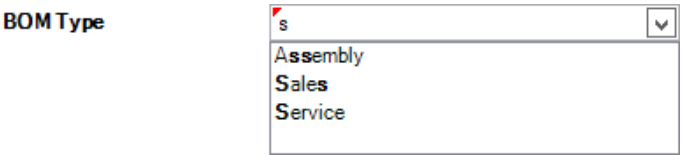
Fields with selection option (reference list)

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.
- 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.

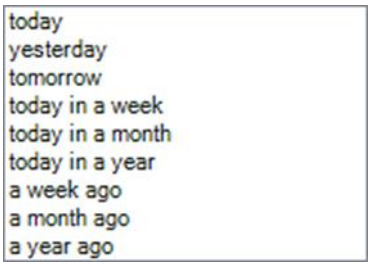


Fields with selection option (category list)

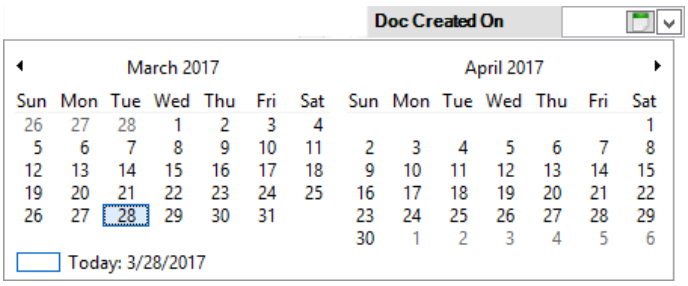
- By clicking the drop-down button, a list of categories is displayed.
- You can select several categories.
- The input of text that is not part of the list is not possible.

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.

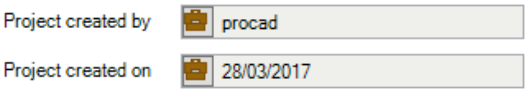


- Date fields may also have a date picker . This is to make the selection of a date even more comfortable via a calendar. The specification of a date range is only possible for search forms. The date picker has to be configured for the field (see manual "Configuration PRO.FILE GUI").



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 in the fields

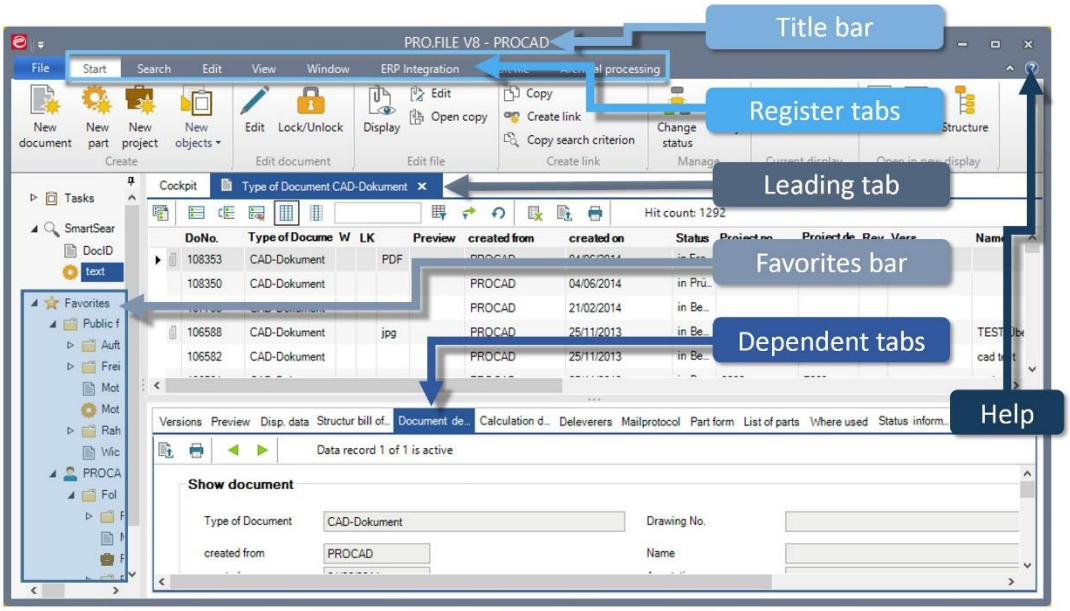
- Fields filled automatically by PRO.FILE:
  Some fields automatically receive a value from PRO.FILE, such as the DB Identification Number, the User (designer), or reference fields.
- Required fields:
  Some fields require an entry, you cannot quit without making an entry.

These fields are indicated by a red triangle in the upper left corner. If you try to confirm the input form without making an entry in this field you will not be able to proceed, and the required field is also marked with a red exclamation mark.

3 Step 3: Search result – get the information

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

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:



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

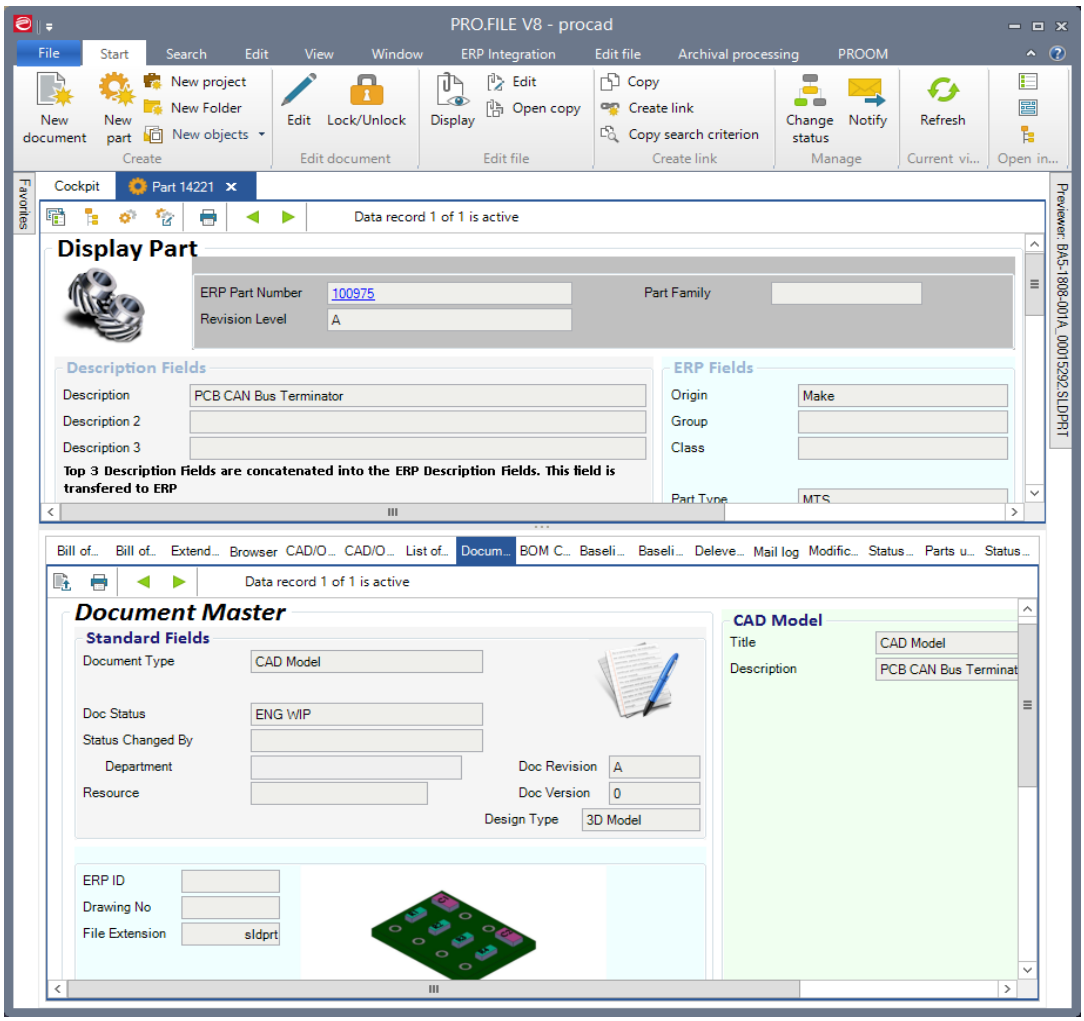
- PRO.FILE form displays
  Display of a single data record in form view, with all available data fields displayed on the form.
- PRO.FILE list displays
  Display of several data records, usually listed by a search criterion.
- PRO.FILE browser displays
  The browser displays are usually not used to display single data records but rather their structures and links to other objects.

3.1 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 selection, 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 for the input or display of data.

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

3.2 Working with lists

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

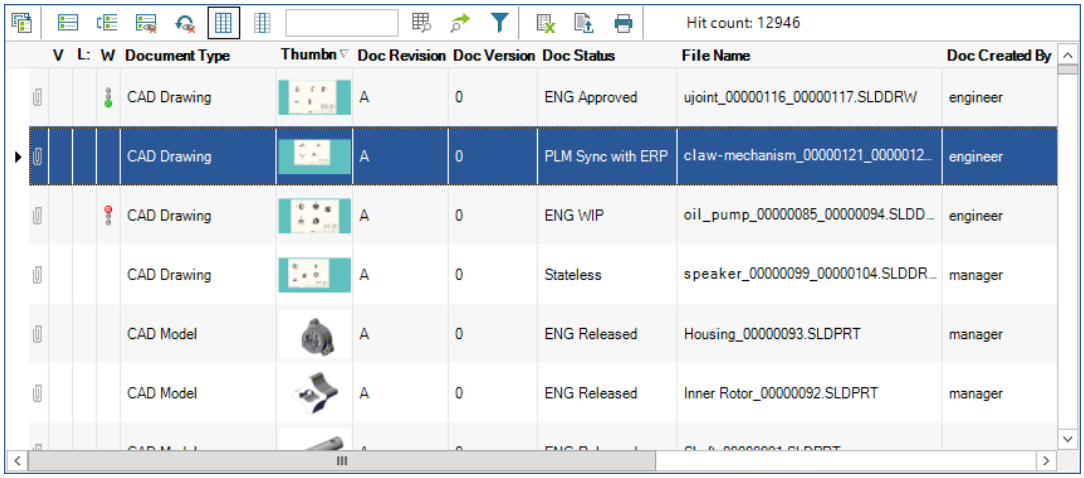
- "List structure" and "Selection of multiple data records"
- Additional user information "Icons within the list display"

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

3.2.1 List structure

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.

The active row is indicated by colored highlighting.



All functions in list mode refer to the active row. You can change the active row by:

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

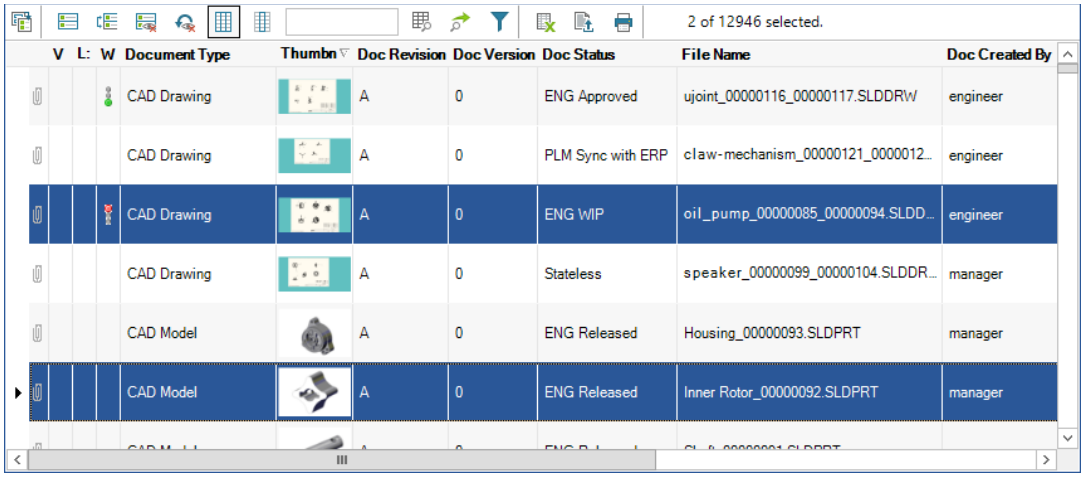
Permanent columns in a list that are always displayed and cannot be scrolled can be made to stand out using a different color. (See also the chapter "Arrange list views and permanently save them").

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

3.2.2 Selection of multiple data records

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.



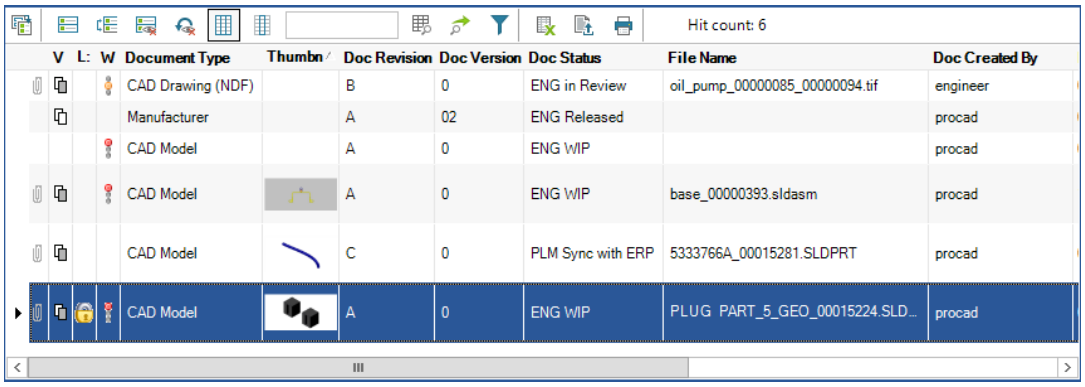
A selection (clicking on the item) will also mark the current line. You can then move the selection using the cursor buttons.

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.

3.2.3 Icons within the list display



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 attached 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.
- This symbol within the document list indicates that newer versions of the listed document are available.

Note:

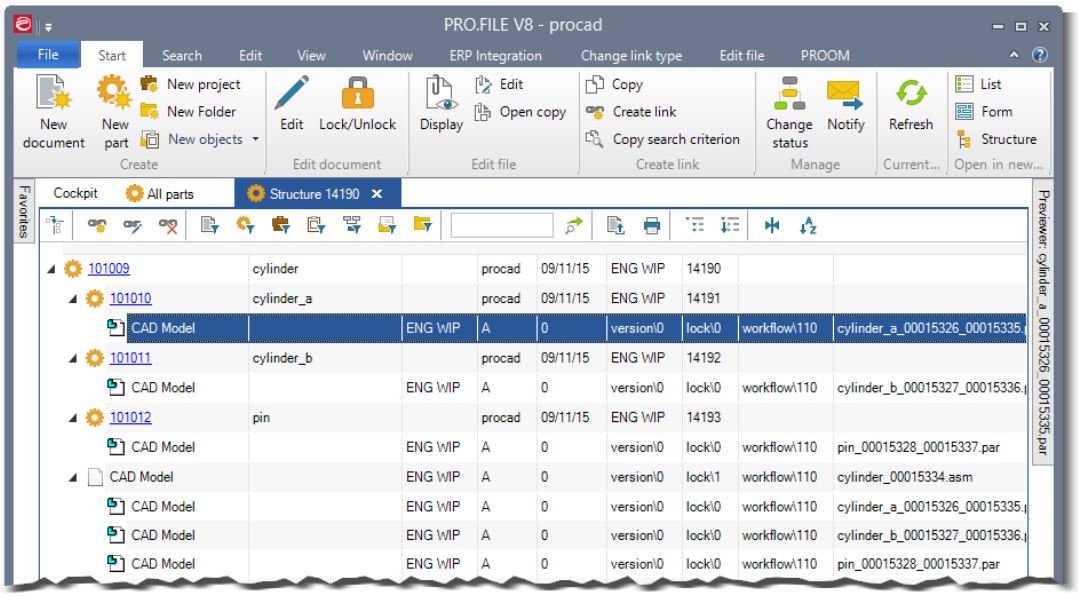
Whether this symbol is displayed or not is set by the system administrator.

- In PRO.FILE, 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".

3.3 Working with browsers

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

The browsers show 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"**-Menu 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.

3.4 The PRO.FILE "View" menu

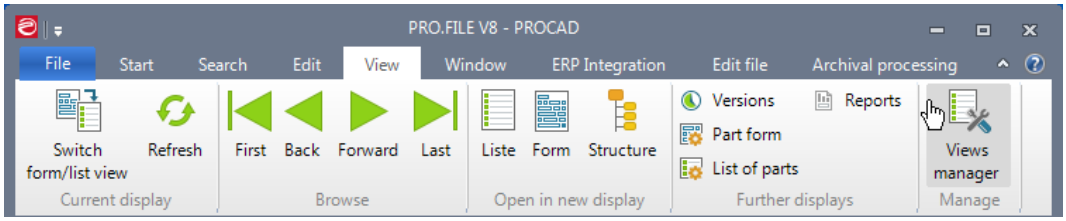
After the selection of the data records in PRO.FILE, the information is presented in a list, or a form view.

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

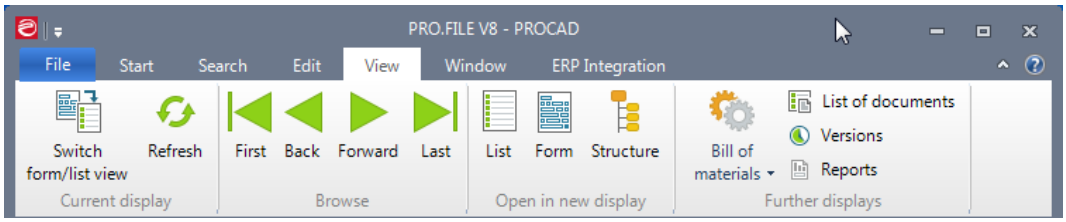
There are special presentation types for all of the PRO.FILE objects. Therefore the functions that are available in the "View" menu, are always dependent on the actual called up object type, and also dependent on the present display (form or list).

The following illustrations show the view menu the way it appears for the various object types:

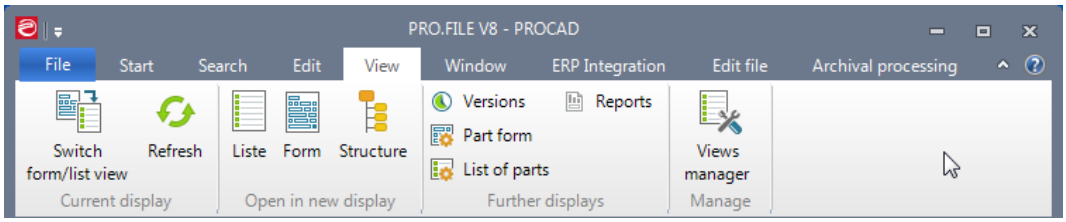
Documents in form display



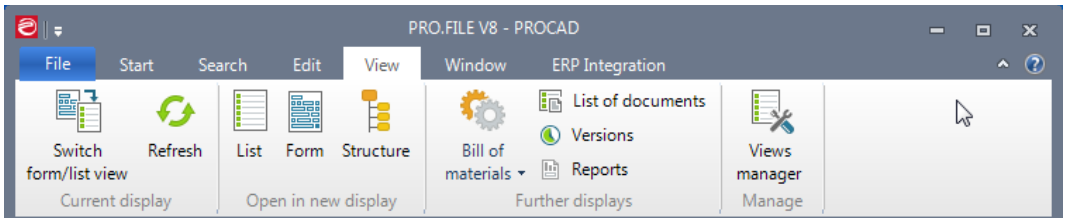
Parts in form display



Documents in list display



Parts in list display



The following list provides a brief overview of the available presentation types and the various functions.

General display types

The following display types are available for every object type:

- "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 presentation 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".

Note:

These functions are also available via the corresponding commands in the menu ribbons.

Display types for parts

- "Bill of materials":
  Enables you to call up different views of the bill of materials for the highlighted part. This includes the structure bill of materials, the single-level bill of materials, the part usage, 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

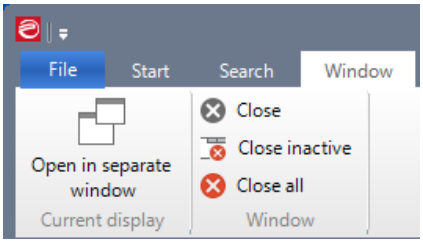
- "Fwd":
  Proceeds to the next data record.
- "Bwd":
  Returns to the previous data record.
- "First object":
  Returns to the data record that was called up first.
- "Last object":
  Returns to the last data record that was called up.

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.

3.5 The PRO.FILE "Window" menu



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

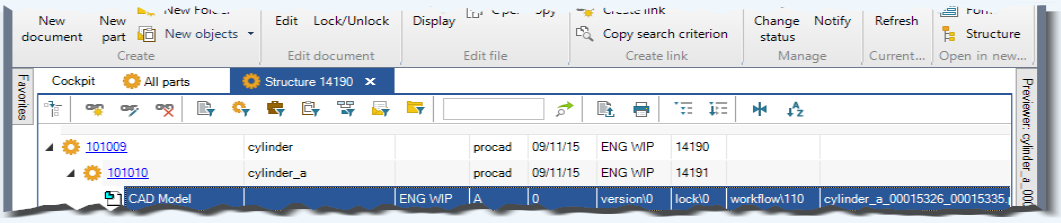
If the mouse pointer is placed on the header of a tab this menu is also accessible from the context menu of the right mouse button.

The following functions are available in the "Window" menu:

- "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: "Displaying 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.

Note:

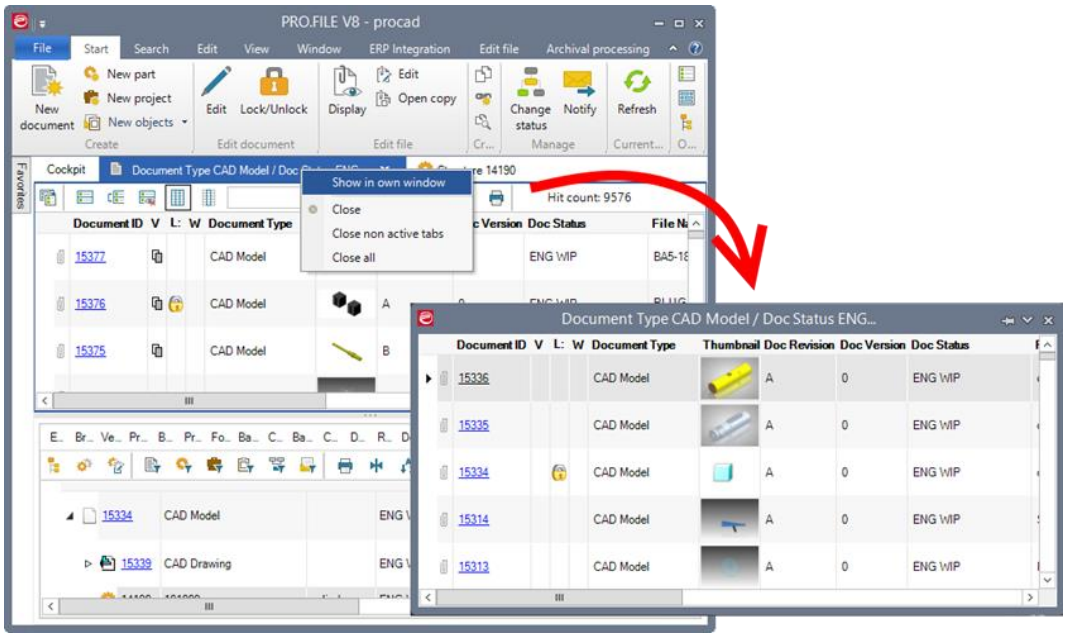
The currently active tab is always highlighted:



3.5.1 Displaying tabs in a separate window

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

- 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 "Create link" for different data records.



Function call:

"Window"/right click on tab => "Open in separate window" / "Show in own window"

If you want to display a tab in a new window please follow the instructions below:

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 "In separate window".

⇒ 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.

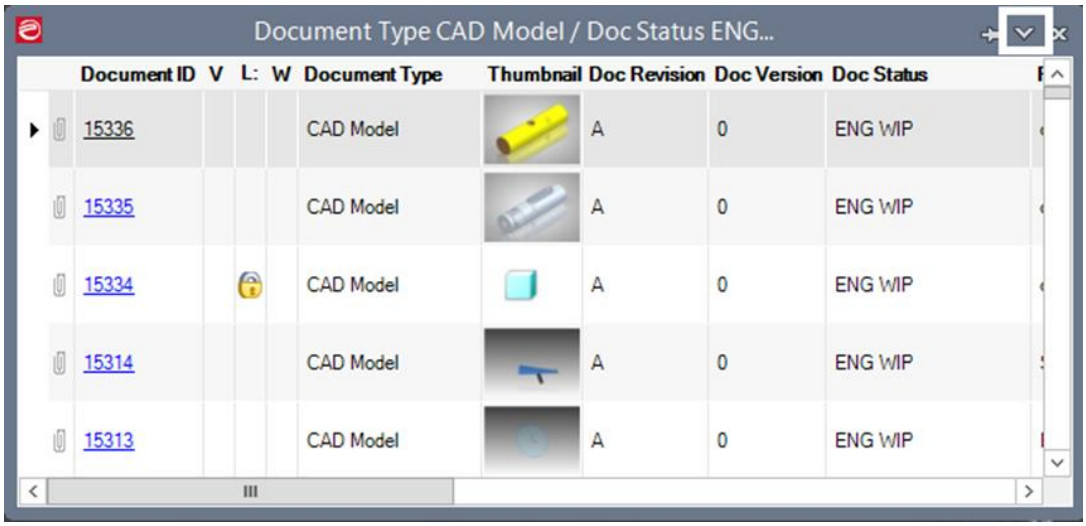
- the user can choose to permanently keep separate windows in the foreground of the general PRO.FILE window. In order to do this, use the icon on the right hand side of the window header

Note:

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

Get separate window back in line with other tabs

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.

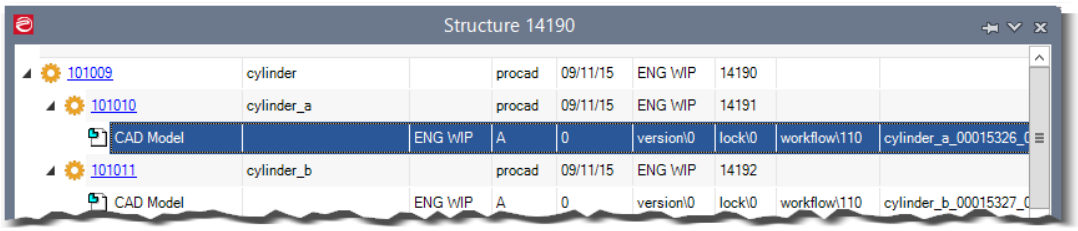


Fixate separate windows to the foreground

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

4 Step 4: How to open document files?

The documents saved under PRO.FILE can be created within various applications such as documents from Microsoft Word, or spreadsheets in Microsoft Excel etc.

These 3 icons are available in the icon bar:

- Display:
  If a file is stored with a document master record, it can be accessed and displayed using this icon.
  Changes cannot be applied here.

- Edit:
  A file that is stored with a document master record can be retrieved from PRO.FILE in order to apply changes. However, you will need the respective authorizations that allow you to apply changes to this document. Any changes applied can then be stored back into PRO.FILE.

- Open copy:
  A file that that is stored in PRO.FILE with a document master record can be retrieved as a copy using this icon. The original document will remain unaffected in PRO.FILE; possible changes will not be saved. This function is used, for example, if someone else has already retrieved this document in order to apply changes or if you lack the required authorizations for applying changes to this document.

The menu command "File edit" from the context Menu allows the user to apply different functions to the document file. These commands are available:

- "Display":
  Displays the document in one of the viewer programs that have been set up for viewing.
- "Output document":
  Prints the document using the printer that is set up as the standard for the operating system.
- "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.
- "Remove document":
  Deletes the document permanently (!) from the database.
- "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.
- "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.

5 Step 5: How to exit PRO.FILE

There are two basic methods of closing PRO.FILE and logging off as a user:

- Via the menu "File" => "Exit"
  With this method PRO.FILE is always closed and the current user is logged off.
- Via the "Close" icon
- of the PRO.FILE window
  As a user you can specify how PRO.FILE is to react when this icon is clicked:
  - PRO.FILE will close and log off the current user.
  - PRO.FILE will be reduced to the system tray. The latter method will make new access to PRO.FILE faster since the current user is still logged in.

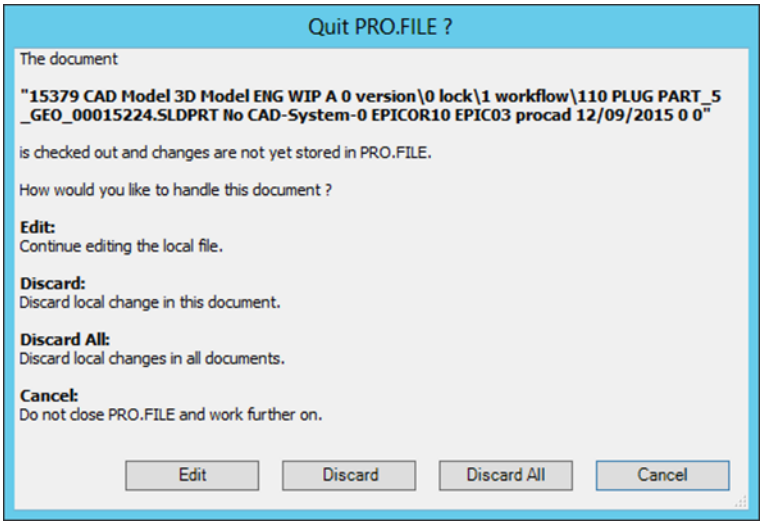
Function call:

"File" => "Exit"

If there are still documents opened for modification and locked, PRO.FILE, in order to secure the protection of your data, asks you what to do with these 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!

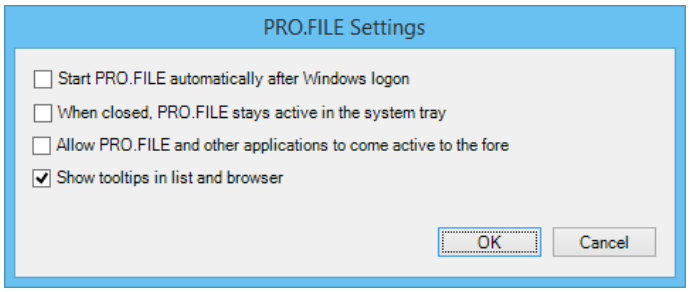
- Cancel
  The closing process is aborted. The PRO.FILE session remains open.

The options in the window "Settings" determine the behavior of PRO.FILE.

Function call "Settings":

- In PRO.FILE: "File" => "Settings"
- Right mouse button on tray icon => "Settings"

Now the window "Settings" appears.
The four options control the following:

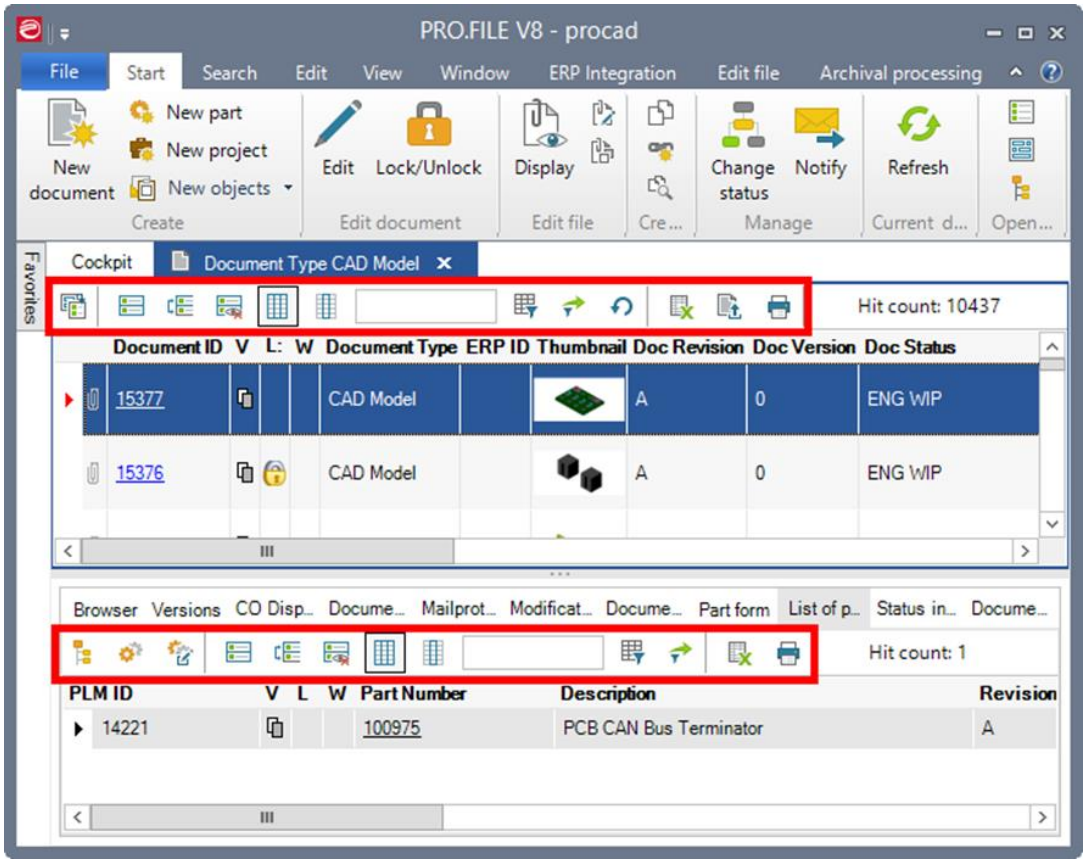


- "Start PRO.FILE automatically after Windows logon": When the user logs in to his Windows account, PRO.FILE is started automatically.
- "When closed, PRO.FILE stays active in the system tray": When PRO.FILE is closed via the ☒ icon, PRO.FILE stays active in the system tray and allows a quick access to the program again.

- "Allow PRO.FILE and other applications to come active to the foreground". This function forces occurring pop-ups by PRO.FILE and other applications to become the active window on your screen. This is to avoid a pop-up staying invisible in the background even though interaction is required, e.g when using an integration function.
- "Show tooltips in list and browser". When tooltips are deactivated, you can press <CTRL> + <T> to re-enable the display of tooltips for a list or browser display in PRO.FILE temporarily. This activation of tooltips via keyboard only applies for the current view and is not saved.

6 Tip 1: Use the 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:



Via these buttons, the following functions are available:

- Select all rows:
  With this button, all rows of a list are highlighted.
- Invert selection:
  With the <Shift> key pressed down, it is possible to select whole areas of a list, with the <Ctrl> key pressed down, you can select several individual rows. The button "Invert selection" can be used to select everything that is not selected and unselect everything that was selected.
- Hide selected rows:
  If several rows of a list are selected, these rows can be hidden from the list with this button.
- 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. .

- : 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 already described wildcards/meta characters.
  The search for the entered character string is started using the icon.
  If the search pattern is found, all matching data records are highlighted.

- Next found pattern:
  This icon is used to once again compare the entered filter pattern with the columns that are to be searched. The next data record found is highlighted.

- Show hidden rows:
  If rows of a list have been hidden, this button can be used to display them again.

- PRO.FILE list selection:
  The entries of the selected rows are selected and opened in a list in PRO.FILE. This ways you can immediately view the stored information without further selection.

6.1 Sort a list, including multi-level sorting

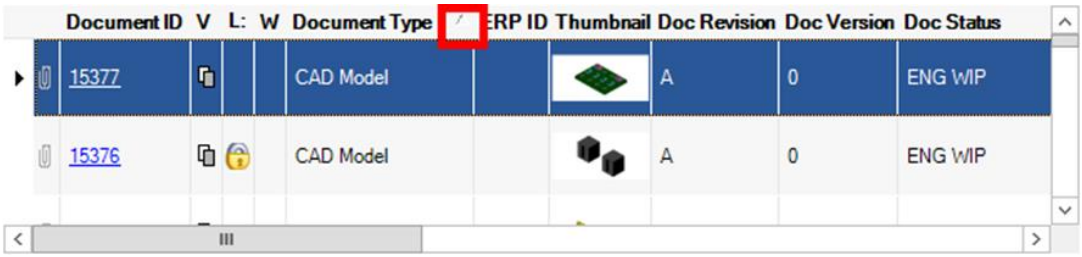
It is also possible just using the keyboard and mouse to carry out multi-level sorting, i.e. an arrangement of the data that takes into account several columns at once.
This multiple selection sorting is carried out using the <Shift>-button.

This is carried out as follows:

1. Press the <Shift>-button.
2. Click on the first column that you want to sort, until the required sort direction is set.
3. A (1) will then be displayed in the column header. This shows that this column will be shown in the first sort-stage.
4. 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.

⇒ 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-level sort:

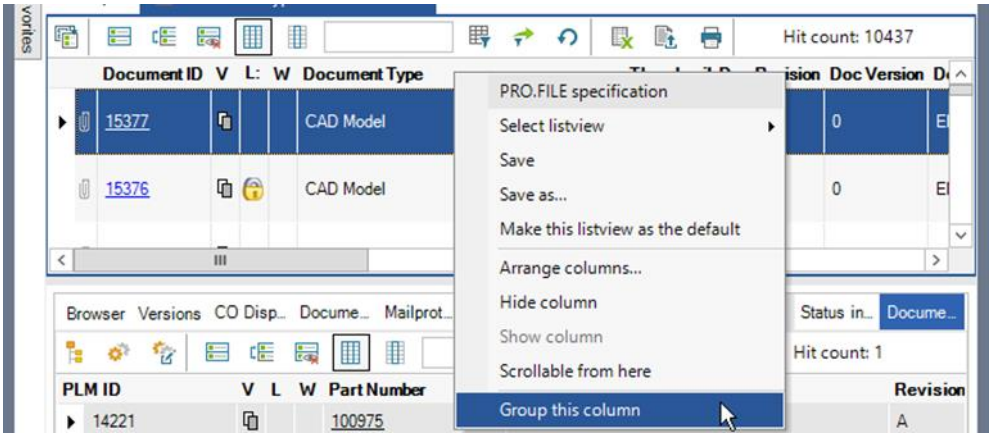


6.2 Group list entries

The PRO.FILE list view gives you the possibility to group the data records found in a list.

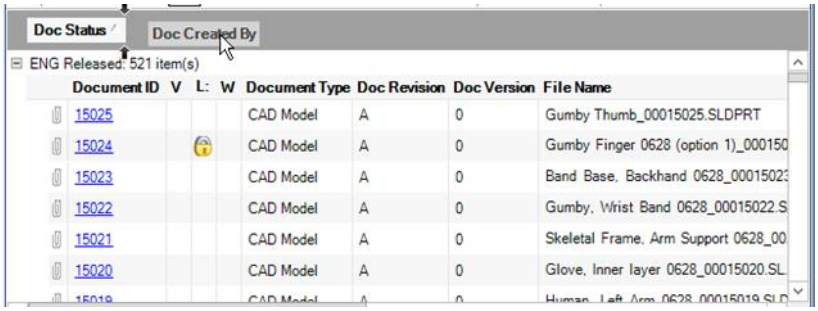
The following example will explain this:

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:

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".

6.3 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 presentation 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 permanently save them". How can I filter the datarecords in lists

6.4 Filter for data records in lists

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

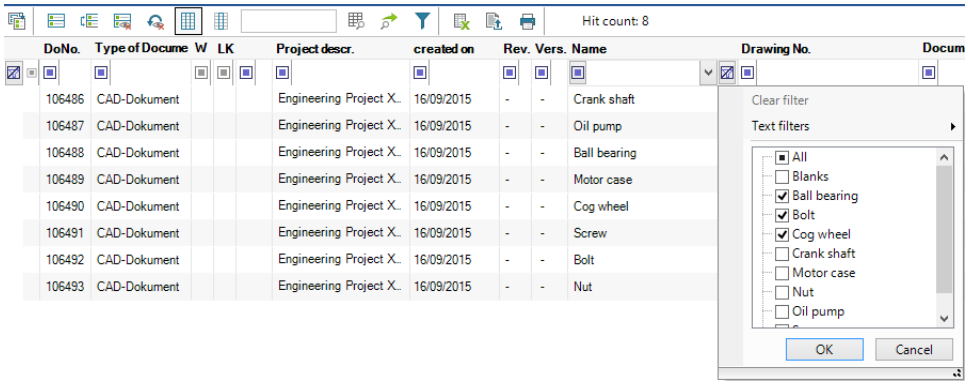
By activating the filter function and clicking on a filter selection in a column of a PRO.FILE list, you can select the desired values from the display of possible values. After that, the list is automatically reduced to the selected hits. Once you remove the filter, the full list is displayed again.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

Proceed as follows

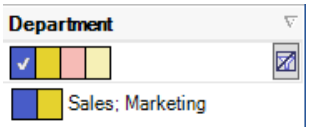
1. Open a list in PRO.FILE via one oft he search functions.
2. Select the icon "Display/hide filter" from the icon bar above the list:

⇒ The list header now displayes the function icons for the list filters.

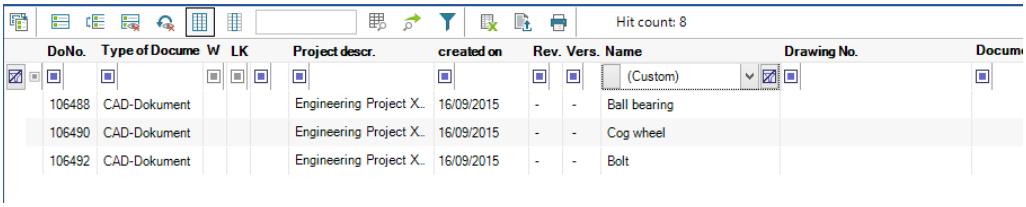
3. Click the icon to select the values from a list column, to which a filter is to be applied:
   - Via the selection "All" you can activate or deactivate all options.
   - You can now select the values to be used as filter.



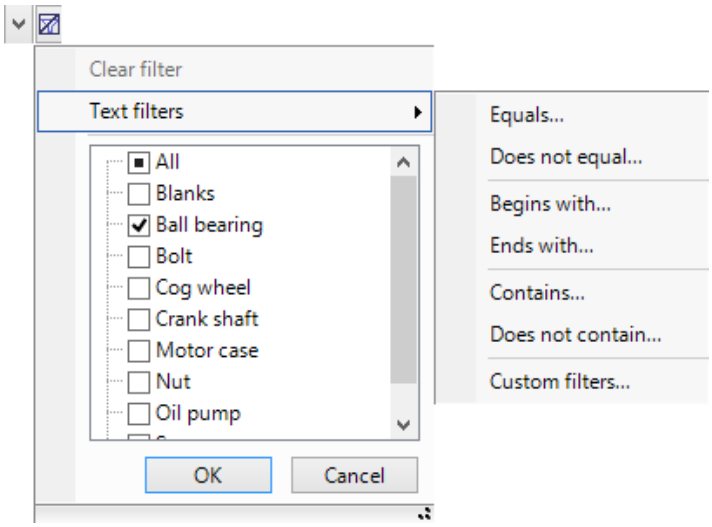
4. If categories are used, you can click on one or more of the colored fields to select the corresponding categories as filter criteria. Only the colors of the categories are displayed in the filter field.



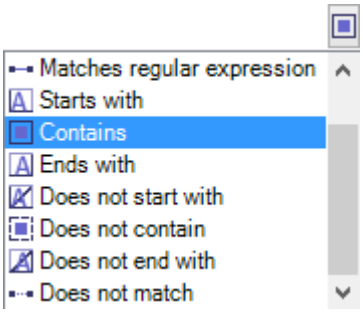
⇒ The list is now displayed with the results according to the filter specified in the column header:



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



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



7. 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.

Note: Filter for user selection

This type of filter is also available for the selection of users in forms. This facilitates the selection of data in systems with many users.

7 Tip 2: 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 permanently save them
- Manage stored list views

7.1 Setting up the dependent tabs

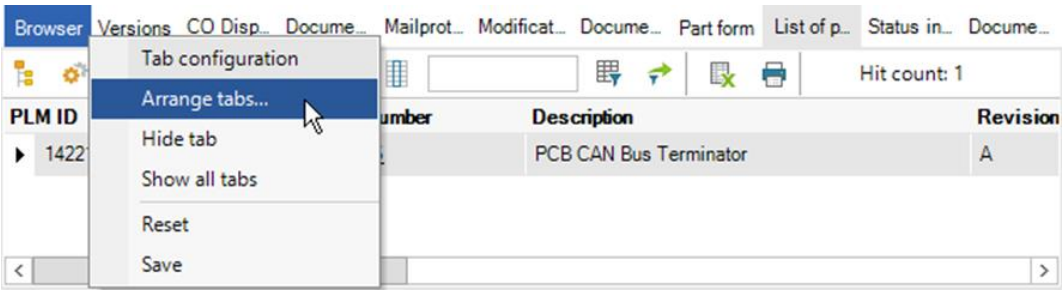
The "dependent tabs" can be displayed for forms and lists. These dependent tabs allow you to directly view additional information for an object that is active in the form or list view.

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:

""Mouse button on tab => Right mouse button



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

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

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.

7.1.1 Arrange dependent tabs

You can customize the display order of the dependent tabs.

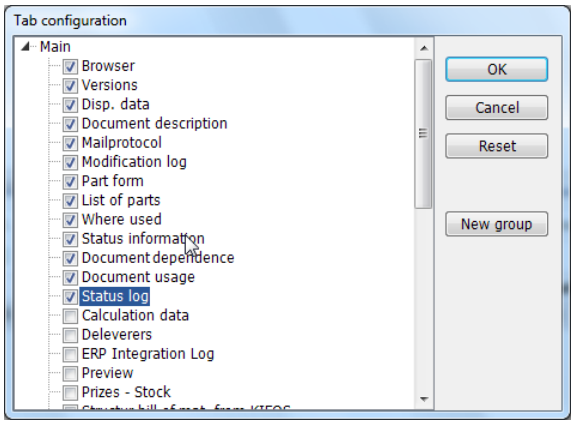
Note:

If you are regularly dealing with large browser structures, parts lists or preview files, it is recommended not have these corresponding tabs configured at the first position. This is to prevent long loading times when an object is selected.

Proceed as follows

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

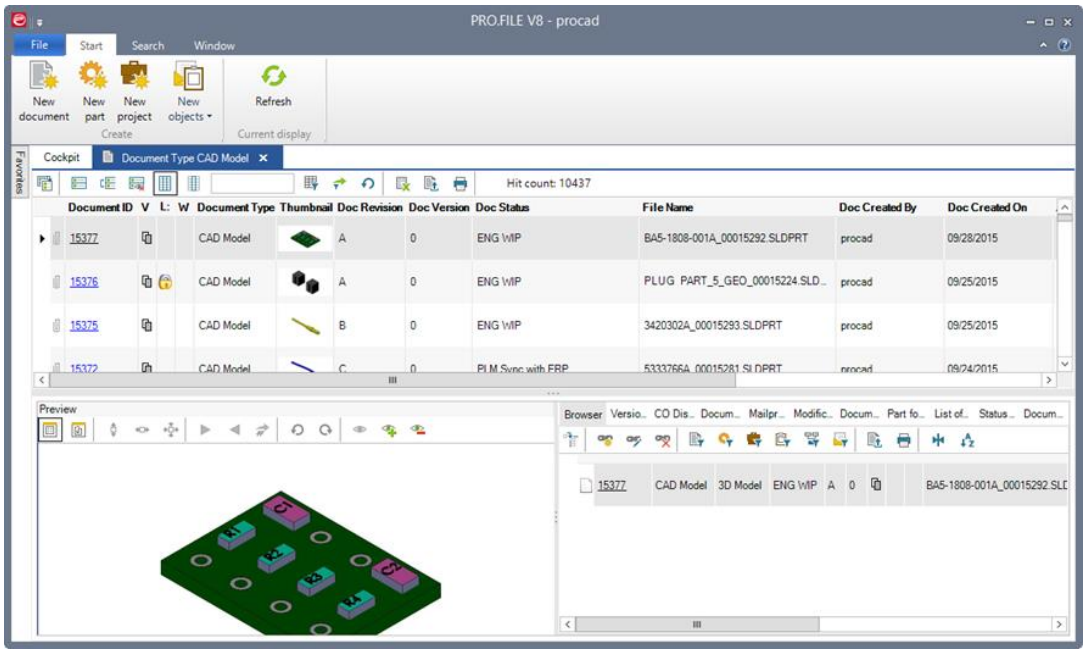
⇒ A new window will appear:



3. Using drag and drop you can now move every entry to the desired position.
4. 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.
5. When you have arranged the tabs confirm your selection by pressing the <OK> button.

7.1.2 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:

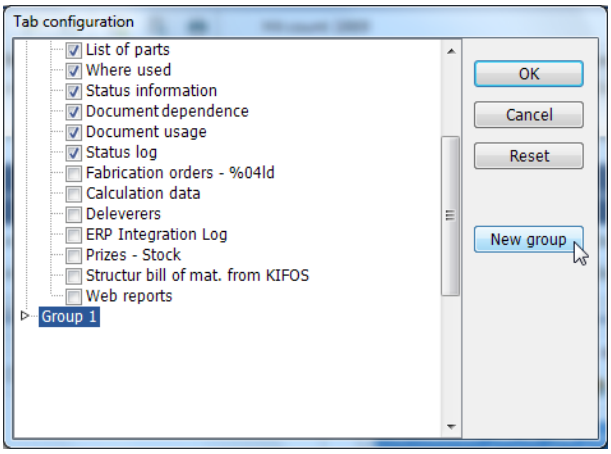


Proceed as follows

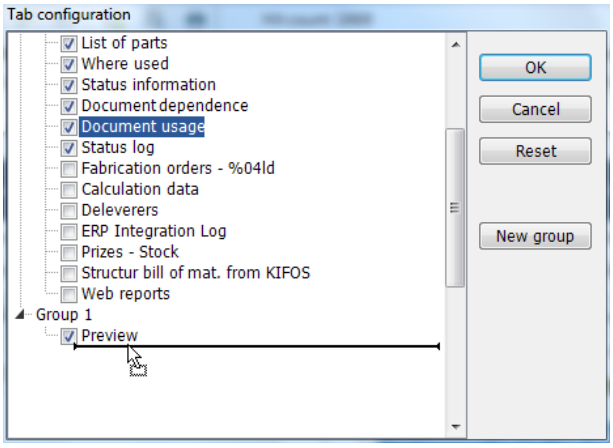
1. Place the mouse pointer over the header of a dependent tab. Press the right mouse button and select "Arrange tabs..." from the context menu.

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. If you want to further subdivide the tab window, you can now create additional groups.
5. Confirm your settings by pressing the <OK> button.

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

7.1.3 Undo the subdivision of the tab window

Proceed as follows

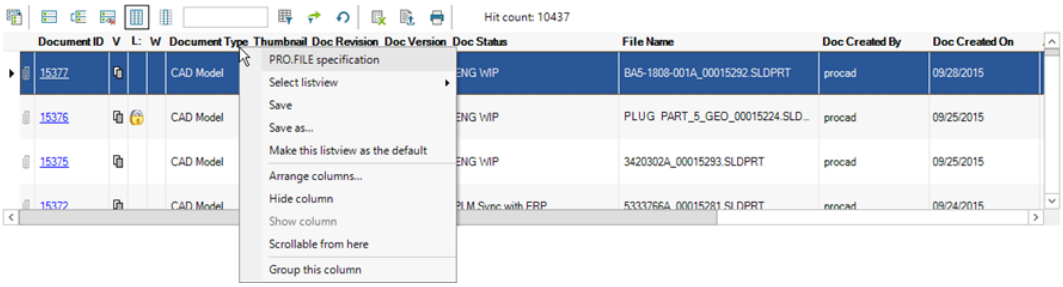
1. Place the mouse pointer over the header of a dependent tab.
2. Press the right mouse button and select "Arrange tabs…" from the context menu.

⇒ 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>.

7.2 Arrange list views and permanently 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 views.

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 is 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 presentations of a list view. This function relies on the specific user authority.
- Save as:
  This function saves changes to a presentation 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.
- Hide column:
  This command blends out the presently active column from the list presentation. 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 always remain visible 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 remain visible in the view. (The column that is active at the time is shown with a small arrow in the column header).
- Group this column:
  It is possible to group lists by dragging and dropping the columns. This function has to be activated through an initial command. Please refer to chapter "Group list entries" for more information.

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

7.3 Manage stored list views

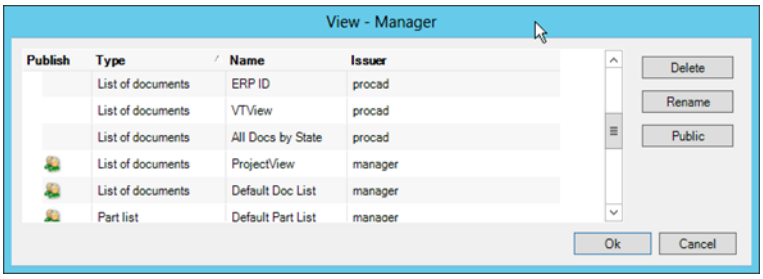
You can create and customize lists in PRO.FILE so that they fulfill your individual requirements. (See also the chapter "Arrange list views and permanently save them").

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! Only the customized view with its presentations will be deleted. Of course none of the list entries or data records will be deleted.
- <Rename>:
  This function can be used when saved lists should be renamed. 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. To publish your lists, highlight the list views required and click on the <Public> button. Published views will then be marked with the symbol .

8 Tip 3: Save your searches

Favorites are saved search procedures – with additional possibilities, including the automated performance of such searches upon PRO.FILE start.

All information on favorites:

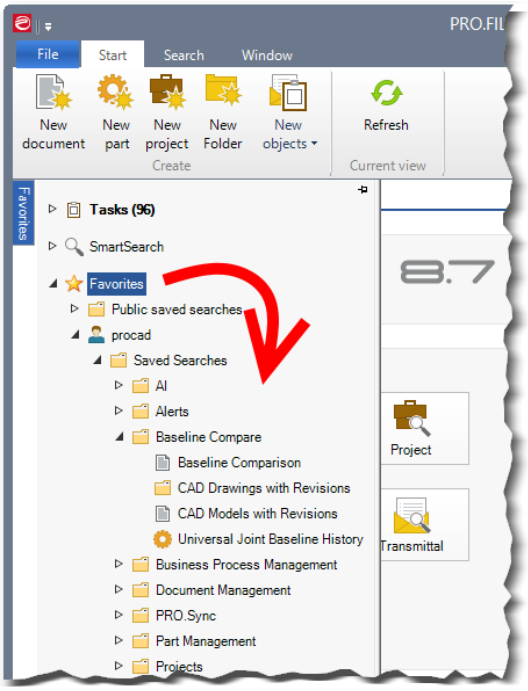
- Saved searches and subscriptions
- An overview of working with saved searches and subscriptions

8.1 Saved searches and subscriptions

The favorites management included with PRO.FILE allows for creation of shortcuts to often used documents and book marking of documents in the database.

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:

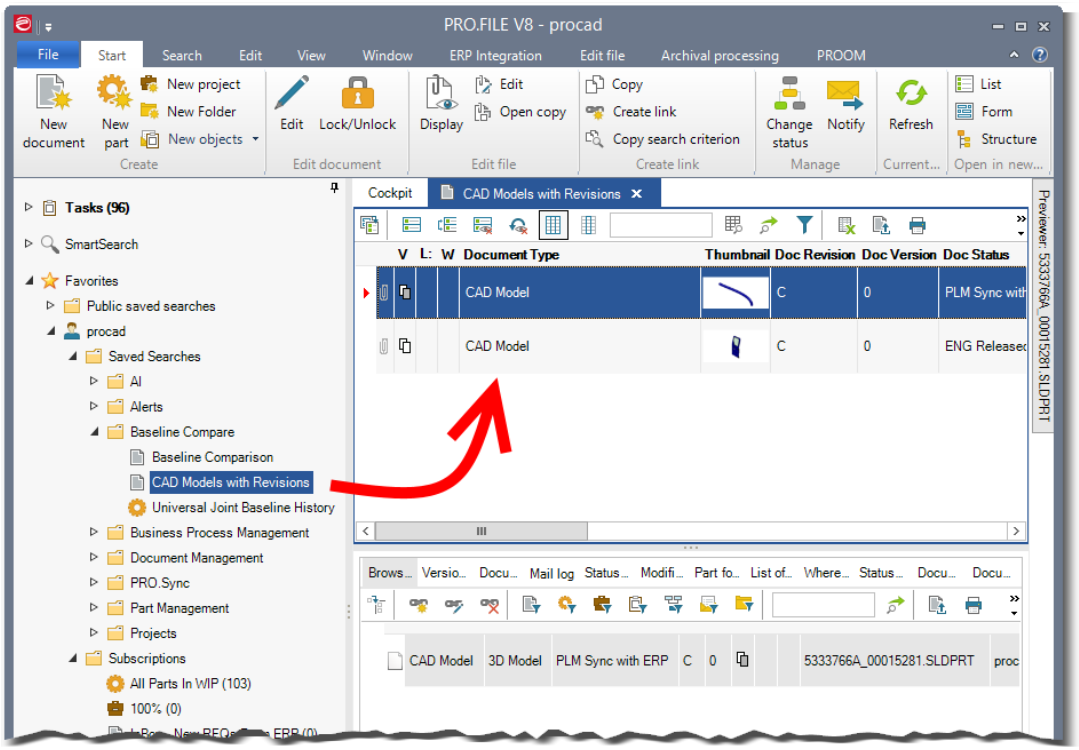
- A subscription can be created for any saved search.
- This subscription monitors a saved search. If changes are made to the subscribed documents, parts or projects, this is indicated in the information bar behind the respective subscription in brackets.

8.1.1 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.

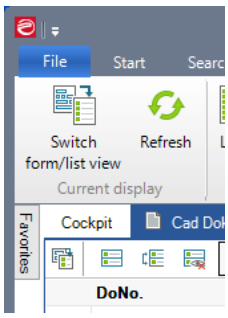


Saved searches offer the following possibilities

- 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.

8.1.2 Combine saves searches as you like

A particularly helpful feature within PRO.FILE includes a function for modifying existing saved searches, by including or excluding documents or search criteria:

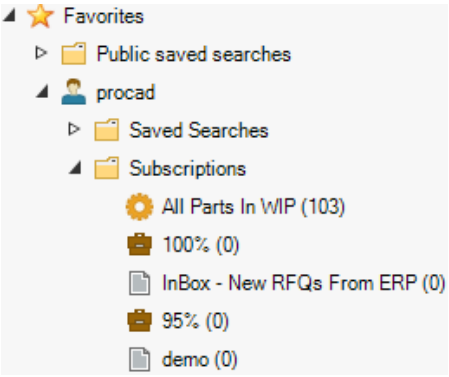
- For example, using a saved search you can organize documents, parts or projects along with common selection criteria, such as documents with IDs 17080 and 25098 along with the "e-mail" document type.
- Once defined, criteria for a saved search can be modified. You can include or exclude criteria as 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.

In the following chapters we will describe functions and management.

8.1.3 Subscriptions

For each saved search that you create, it is possible per mouse click to simultaneously create a subscription.

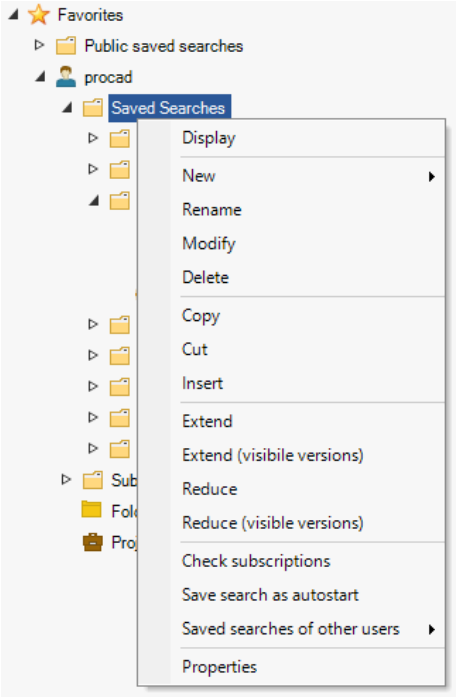
- When PRO.FILE is started, a comparison is carried out in the subscription, to see if anything has been changed in the objects of the saved search. A check will be run to see if new or changed objects exist.
- If this is the case, the number of changes and reforms will be shown after the name of the 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.

8.2 An overview of 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 favorite-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
- 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.
- Delete:
  Removes a saved search or subscription from the favorites 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 from another user. See chapter: "Copy saved searches" for more information.

- Cut:
  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.
- Extend / Extend (visible versions): With these functions, the existing saved searches are enhanced by the contents of the PRO.FILE clipboard. This is valid both for memorized parts/documents/projects and for search criteria. See also "The functions "Extend" and "Reduce". Relative time information remains unchanged in the saved search, and is re-evaluated each time the saved search is called up.
- Reduce / Reduce (visible versions): With these functions, the existing saved searches are reduced by the contents of the PRO.FILE clipboard. This is valid both for memorized parts/documents/projects and for search criteria. See also "The functions "Extend" and "Reduce".
- Check subscriptions: Subscriptions inform the user of the changes to the elements in the corresponding saved search. The subscriptions are automatically updated when PRO.FILE is started. This function is to manually update the subscription whilst working in PRO.FILE.
- Saved search as autostart: With this function, a saved search can be set up to be started automatically when PRO.FILE is started. The contents of the saved search are then immediately displayed in a list. A saved search configured for autostart is marked with "Auto start" in parentheses after the name of the saved search.
- Saved searches of other users: Enables a user, with the help of the sub functions "Display" and "Hide", to access the saved searches of another user.
- Properties: Displays the description of a saved search or, in case of a subscription, the saves search the subscription is based on.

Detailed information on the handling of favorites and subscriptions can be found in the following sub-chapters.

8.2.1 Create a new saved search

With the favorites administration of PRO.FILE, lists of documents, parts or projects can be under a custom name for later access.

Using the PRO.FILE favorites administration, you can define two different kinds of saved searches:

- Static:

  On the one hand, you can define a list of documents, parts or projects as saved search. Additionally, you may then include or exclude documents from this saved search.

  When the saved search is called up at a later time, the same list as defined and enhanced/reduced before is displayed.

  Example: A saved search for the report template with the ID 13254

- Dynamic:

  On the other hand, you can define only selection criteria for documents, parts or projects for a saved search.

  When this saved search is called up at a later time, the a search is made using the defined search criteria, returning a list of results matching the criteria at that particular time.

  Example: All parts currently "in Review". All documents related to a specific project.

Creation of saved searches is always based on data stored in the PRO.FILE clipboard and therefore requires that you use the "Copy" or "Copy search criterion" function first.

A saved search can be made from individual documents/parts/projects ("Copy") or from search criteria ("Copy search criterion"):

- "Copy": If the saved search should contain the exact contents of the list => static.
- "Copy search criterion": If the saved search is to be made from the critera that lead to the search result.

Note:

A saved search can either call up documents **or** parts **or** projects. It is not possible to combine the object types.

Proceed as follows

Create a static saved search

1. Select the desired data records in a list.

Create a dynamic saved search

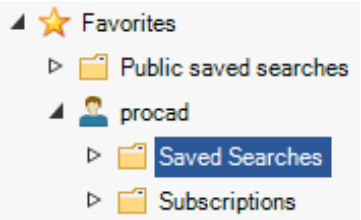
1. Start a search with a search form. Use the search criteria to be stored in the saved search.

2. Choose one of the following functions from the context menu using the right mouse:

3. "Copy"

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.

8.2.2 The functions "Extend" and "Reduce"

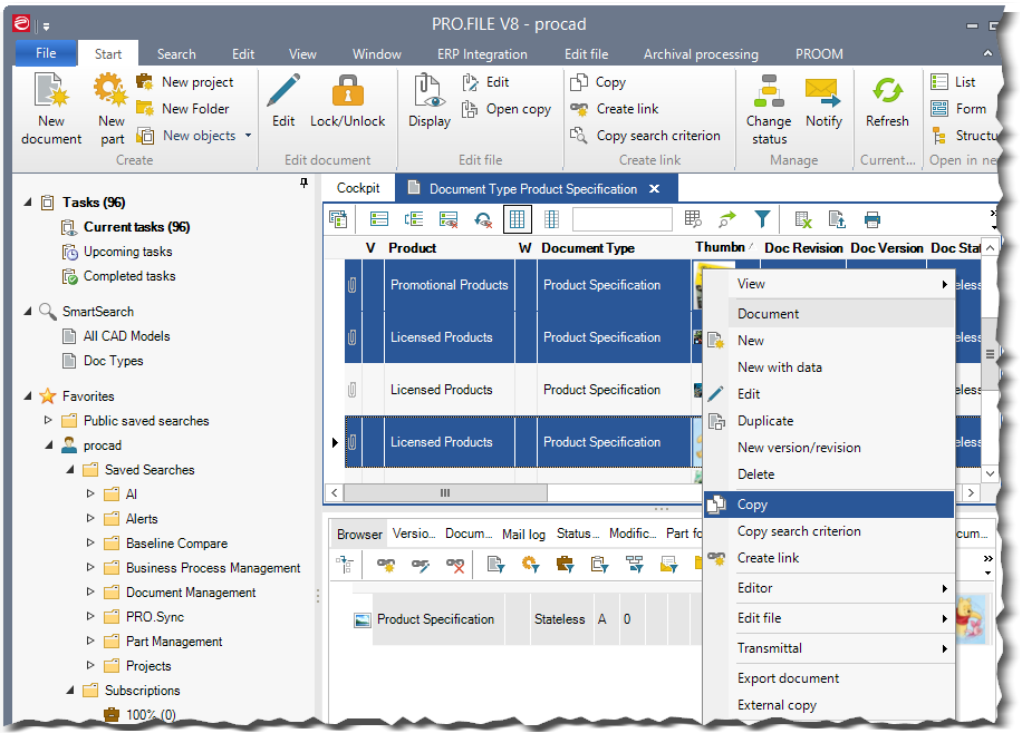
The Include and Exclude commands are very helpful in managing saved searches.

- 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.

8.2.3 An example for a new saved search

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.

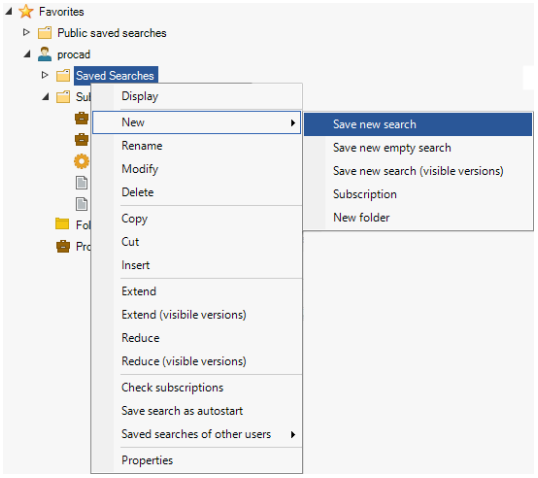
1. To collect the documents with a saved search, the user selects the three documents in a document list window.
2. Next, the "Copy" command is called (using the right mouse button or from the "Edit" menu).



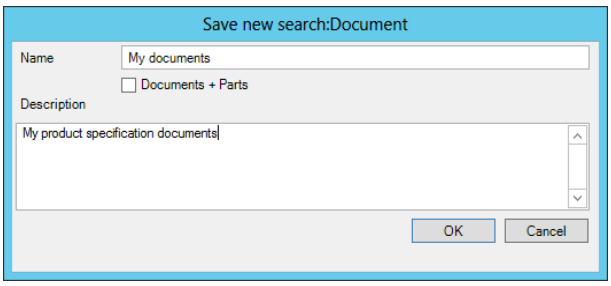
⇒ This results in PRO.FILE adding these three documents to the PRO.FILE Clipboard.

The next step is to activate the list of saved searches in the favorites bar. Now we can create a new saved search:

3. 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.



4. 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.



5. Confirm your input with <OK>.

⇒ PRO.FILE updates the list of saved searches to include the new one.

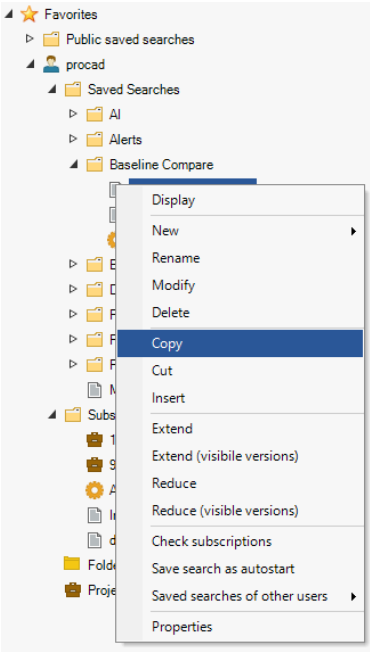
⇒ Double-clicking the saved search will result in PRO.FILE displaying a window containing a list with objects that have been defined for the favorite.

8.2.4 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.

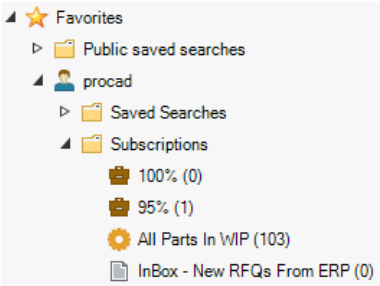
8.2.5 Create a new subscription

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.

8.2.6 Access saved searches of other users

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.

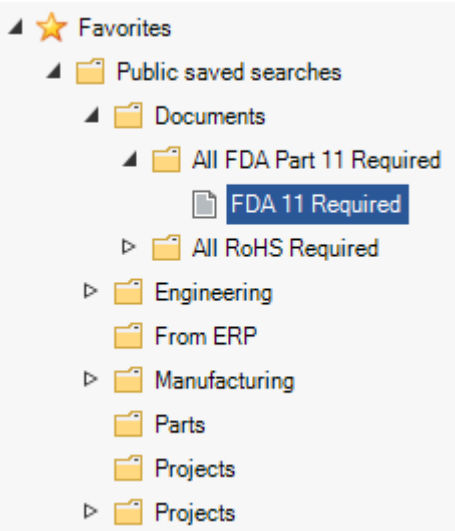
8.2.7 Public saved searches

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.



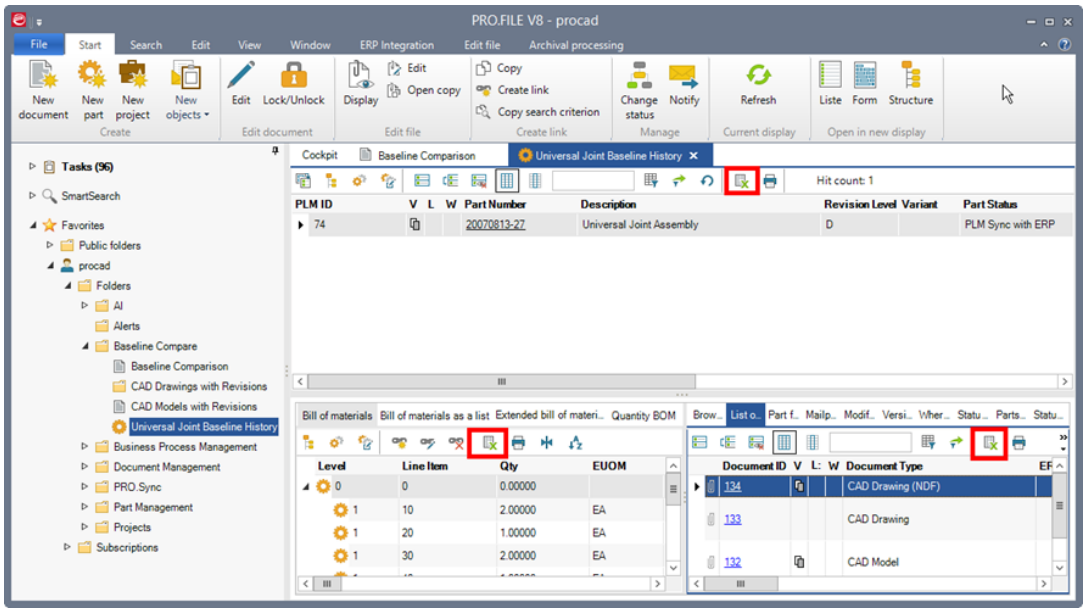
Note:

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.

9 Tip 4: 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.

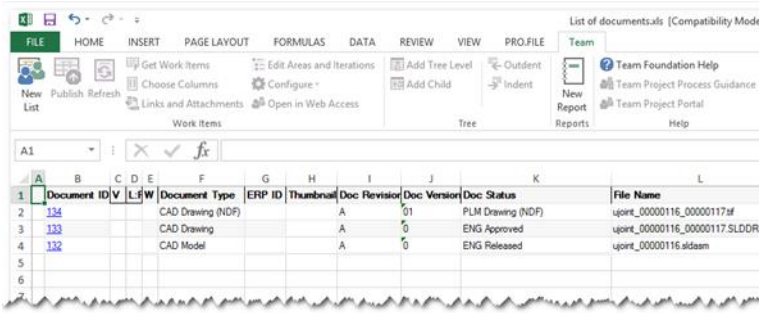
The export of such displayed data can be made from the main tab as well as from the dependent tabs.



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.



⇒ From category fields, only the category names are exported and separated by a semicolon. Colors are not exported.

⇒ For better display, the column headings are displayed for each level of the exported structure in Excel separately.

10 More information to look up

Some useful background knowledge can be found in the following chapters:

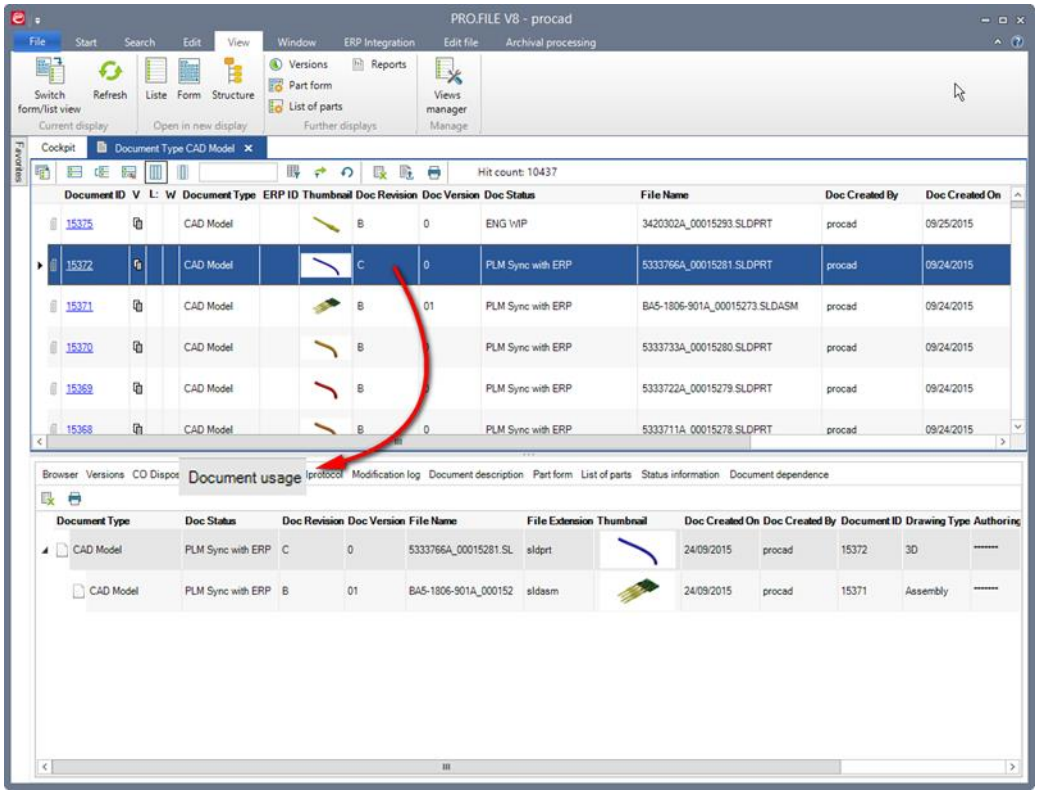
- The dependent tabs in PRO.FILE
- The buttons – an overview

10.1 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 tab 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.

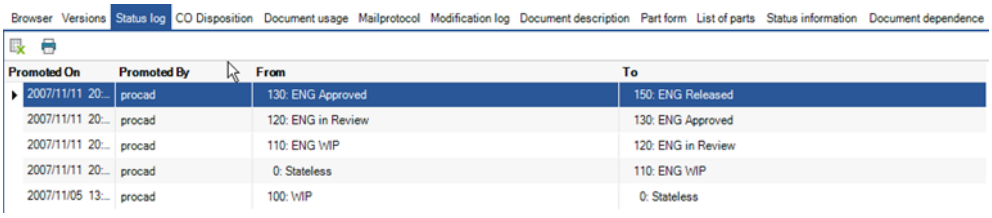
The configuration of the tabs is made via the context menu => function "Arrange tabs..." (see chapter "Setting up the dependent tabs").



Dependent tabs that are available for documents, parts and projects:

- "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 from the change log, for example: 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.

- "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 and when, and information on who retrieved an attached document and when.
- "ERP-Integration log":
  If your PRO.FILE is linked to an ERP system, this tab contains information on the exchange of the documents.
- "Mailprotocol":
  This dependent tab contains a log on which users have been notified at what time about the selected PRO.FILE object.
- "Status log":
  Displays a list of the completed workflow transitions stating the workflow date, the user in charge, and the workflow comments. This allows you to retrace the sequence of the condition changes of a selected document or part through the specified workflow transitions within the company (e.g. from construction to manufacturing).



- "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".
- "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.

Dependent tabs that are available for documents in particular:

The following tabs are only available for documents:

- "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.
- "Versions":
  If a document is versioned, the database will contain older versions or revisions of the currently displayed document master data. This view lists all older versions available for the selected document:
  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 description":
  This tab displays the description of your current document in the PRO.FILE form view.
- "Document structure":
  Displays the structure of the document, i.e. all documents that are linked in the structure below the active document. This display is similar to the browser display but only displays 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:

The following tabs are only available for parts:

- "Parts 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.
- "List of documents":
  Displays all documents for the selected part that are attached to this 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.
- " Bill of materials as a list":
  Displays the bill of materials as a list with the possibility to select several parts.
- "Extended bill of materials":
  List with more information on the parts. The part selected in the main tab is displayed in the extended bill of materials again as position 0.
- "Quantity BOM":
  Via this tab you get a list that shows which paarts are used in which quantities within the assembly.
- "CAD/Office-browser":
  Displays the structure of the parts that have been saved via a PRO.FILE integration.
- "CAD/Office-list":
  Displays all parts of the structure that have been saved via a PRO.FILE integration.
- "Versions":
  When a part has been versioned, the older versions of the part master record are saved in the database. This dependent tab lists all available versions of the part master record.

Dependent tabs that are available for projects in particular:

The following tabs are only available for projects:

- "Project form"
  Displays the project description in the form view.
- "Project manager"
  On this tab you can assign project roles to PRO.FILE users. With the assignment of the role, the users automatically get project-specific status permissions in PRO.FILE.
- "Gantt chart"
  Displays the timeline of a project based on the tasks created in the context of the project.
- "Tasks"
  This tab displays a list of the tasks that have been created in the context of the project.

- "Role assignment"
  In the project management of PRO.FILE, status permissions can be assigned project-specifically. For this, the users are assigned specific roles and thus assume the status permissions within the project for this role.
- "List of documents"
  The documents list displays all documents that are linked to the project in list view.
- "List of parts"
  The parts list displays all parts that are linked to the project in list form.
- "Document form"
  Displays all documents that are linked to the project in form view.
- "Part form"
  Displays all parts that are linked to the project in form view.

10.2 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
	Display		Search in active column
	Open copy		Search in all columns
	Edit file		Switch between form and list display
	Redline		Change search
	Output document		New change list entry
	Copy		Delete change list entry
	Create link		Edit change list entry
	Search document		Status change
	Search part		Open structure display
	Search project		Open list display
	Hide/show documents		Open form display
	Hide/show projects		Go to page …
	Hide/show parts		Next page

	Full-text search document		Previous page
	Full-text search part		Filter for part search
	Full-text search project (n.a.)		Preview file
	Create new document description		Preview thumbnail
	Create new part		Rotate 90° left
	Modify		Rotate 90° right
	Lock/unlock		Adjust height
	Close window		Adjust width
	Insert link		Adjust
	Delete link		Show structure BOM
	Change link		Show part usage
	Filter		Show BOM editor
	Next found pattern		Save
	Select all rows		Reset
	Hide selected rows		Views manager
	Invert selection		Enlarge selection
	Export list to Excel		Enlarge
	Previous element		Make smaller
	Next element		Print

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