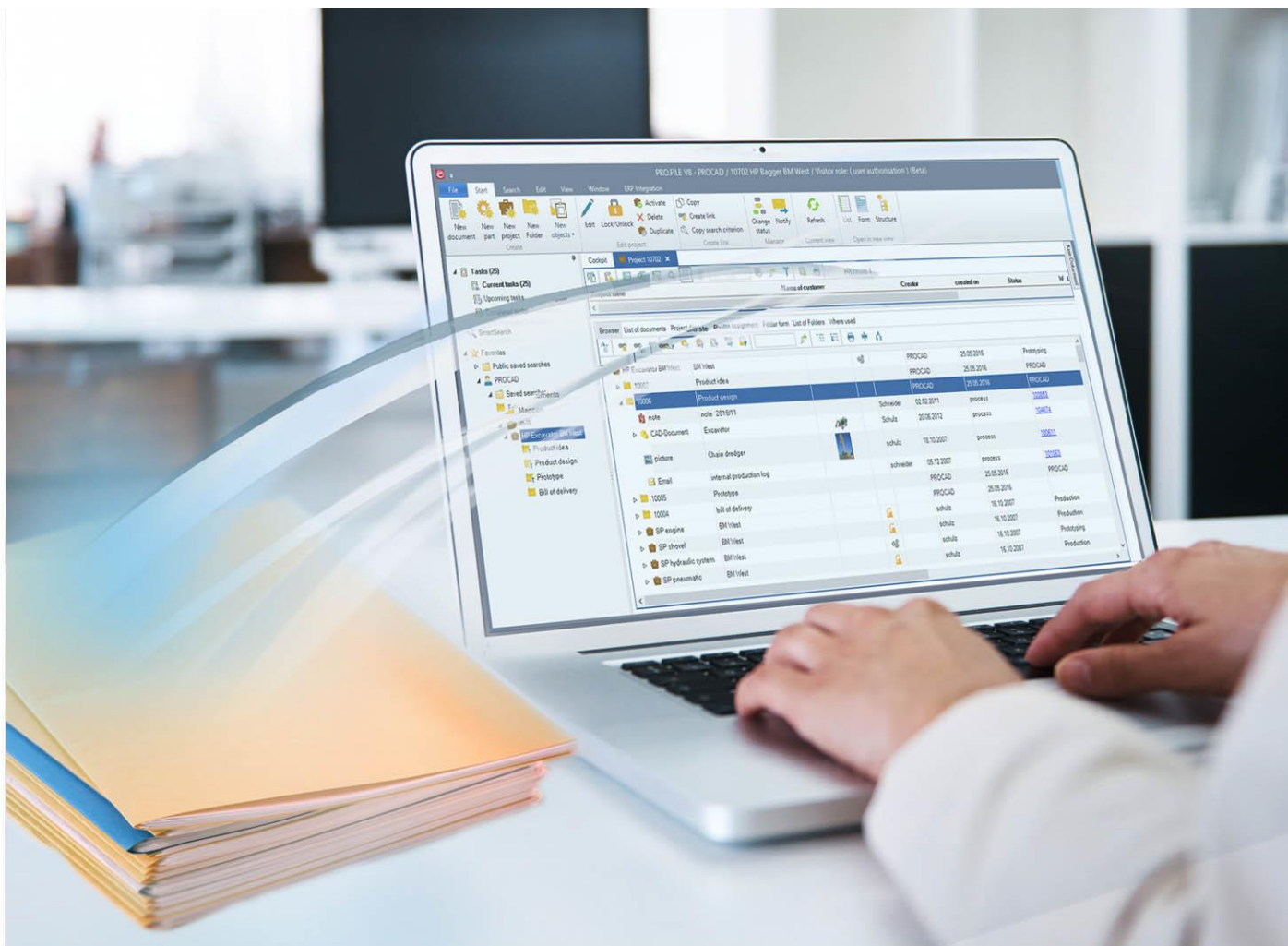


Operation PRO.FILE Pocket

PRO.FILE Release 8.7
April 2017



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About this manual

Step-by-step instructions:

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

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

Menu sequences and function calls

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

Example:

"File" => "New" =>

"Document description"

Buttons and keys

Keys and buttons are highlighted by angle brackets.

Example:

"Confirm with <OK>."

Notes and warnings

To highlight special information the following icons are used:



Function call:

"PRO.FILE" => "Extras" => "Options" => "Performance"



Example:

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



Note:

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



Attention:

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



Important notes:

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



Attention – Undo not possible:

All entries and configurations described in these boxes have to be made carefully, because they cannot be undone!

1 An introduction to PRO.FILE Pocket

In spite of the fact that the internet is widely-used there are still situations within distribution- and service processes that do not allow an online access to digital documents of PDM or document management systems.

PRO.FILE Pocket provides you a comfortable solution to take and transport data and documents from PRO.FILE in a digital form. Thus you are able to provide data and documents on mobile media.

Sales managers, service technicians and project managers can copy any data or documents to their personal PRO.FILE Pocket – e.g. to their laptop or any other digital media.

When visiting a customer they are now able to work with these documents offline. Customer questions can be answered immediately. Time critical decisions concerning technical and commercial issues can be answered without delay.

PRO.FILE Pocket is especially suited to make documents belonging to certain projects or machines that were supplied before available to the customers on mobile data media.

To display the data and documents, HTML masks and the PRO.FILE Pocket Viewer are used.

1.1 Function description

Composition of PRO.FILE part master data, projects and documents in a Collect box

- Using the PRO.FILE research functions and mechanisms of selection, you are able to copy as many documents and part master data as you wish to the Collect box.
- Besides single parts and single documents it is also possible to copy documents with attached structures, assemblies with attached structures and complete projects to the Collect box.
- Collect boxes may be filled up step by step and can also be named.
- PRO.FILE Collect boxes are available to PRO.FILE parallel and over any period of time.

You will find further information to this topic in the following chapter: "[Bringing together PRO.FILE objects in a Collect box](#)"

Export of a Collect box

- Having filled up the Collect box it is now possible to export it to PRO.FILE at any point in time. The exported documents will be copied to the data system of a mobile machine or to a mobile data media. Meta data of parts and documents will be embedded in XML-format in an HTML page. Meta data and data sets together add up to the PRO.FILE Pocket. It can be carried arbitrarily on computers and mobile data media.
- Collect boxes may be exported as often as wanted.

- The data, documents and projects always have the updated functional characteristics which are saved in PRO.FILE at the moment the export is done.
- Part master data and documents that were exported to PRO.FILE Pocket can be changed within PRO.FILE without limitations.

You will find further information to this topic in the chapter: "[Exporting a Collect box](#)"

Using PRO.FILE Pocket

- The data and documents that are located in a PRO.FILE Pocket will be opened and displayed by an HTML page.
- Single documents and parts can be identified with the characteristics of the PRO.FILE meta data.
- The structure of parts and documents of a project as well as the structures of assemblies and documents will be displayed in a hierarchical browser.
- The meta data of parts and documents will be displayed in fields. It is also possible to display the specific characteristics of product groups and certain documents types.
- By the use of a hyperlink documents will be opened and displayed in the original format.

You will find further information on this topic in the following chapter: "[Using the Pocket Viewer](#)".

2 Working with PRO.FILE Pocket

PRO.FILE Pocket allows you the possibility to extract PRO.FILE objects quite simply from PRO.FILE, and load them onto a mobile medium without having to provide PRO.FILE access.

For this, you put a selection of PRO.FILE objects into a Collect box. When required you can then export this Collect box with its actual status into your file system, or onto a mobile memory drive.

Using the PocketViewer you can then access the data offline without connection to PRO.FILE. The display of the data, documents, and structures is carried out using HTML masks, and the local use of an Internet browser.



Note: Function "Memorize for Pocket"

In the default configuration of PRO.FILE, the function "Keep in memory for Pocket" is only available via the context menu (right mouse button) but not via the ribbon bar. The function has to be enabled by the PRO.FILE administrator as described in the manual "Configuration PRO.FILE GUI".

Proceed as follows

The following brief description shows you how you can work with PRO.FILE Pocket.

1. Select the document, project, and part master data that you want to pack in the PRO.FILE Pocket Collect box from PRO.FILE. For this use the standard PRO.FILE search and select functions. Highlight the desired objects in your list or form view.
2. Select the function "**Memorize for Pocket**" from the PRO.FILE "Edit"-menu.
3. You can now put you Collect box together, and select which structure elements and PRO.FILE document types you want to include during the export process.
See also the chapter: "[Bringing together PRO.FILE objects in a Collect box](#)".
4. If you now want to extract the data for use independent from PRO.FILE, you can now export the chosen Collect box to the file system of your computer, or to a mobile memory drive. The export is then carried out in a directory that you have previously determined as your pocket. This pocket can now be transferred to a system even if the system does not have PRO.FILE access, and viewed with the help of the PocketViewer.
See also the chapter: "[Exporting a Collect box](#)".
5. If you now want to view the PRO.FILE objects, metadata and structures that you have exported, call up the Pocket Viewer via the explorer. All elements that are exported using a Collect box are available to you.
See also the chapter: "[Using the Pocket Viewer](#)".

2.1 Bringing together PRO.FILE objects in a Collect box

The first step when using PRO.FILE Pocket is the bringing together of the desired PRO.FILE-objects for later offline viewing using the PRO.FILE PocketViewer. For this, part master records, projects and document must be selected and transported into a Pocket Collect box.

What is a Collect box?

A Collect box contains all the references to all of the PRO.FILE-data that is later to be exported for PRO.FILE Pocket. These data are all available in the Pocket-Viewer with all of the contained structures and independent from the database after the export.

A PRO.FILE Collect box offers the following possibilities:

- A Collect box can contain as many documents, projects and part master records as you require. These PRO.FILE objects can be selected using the standard PRO.FILE select and research function and copied directly into the Collect box from the PRO.FILE list or form views.
- A Collect box can contain objects with structure as well as simple objects. This includes for example documents that have bound structures, assemblies with attached sub-structures as well as complete projects and sub-projects.
- The Collect boxes can be filled step by step. In this way it is possible to add documents, projects and part master records into an existing Collect box. A Collect box guarantees at the point of exportation that the most up to date version of files is transported from PRO.FILE.
- The Collect boxes can be given "talking" names and made permanently available in PRO.FILE. They can be exported as often as you like.

Proceed as follows

[Step 1: Selecting the PRO.FILE objects for the Collect box](#)

[Step 2: Selecting the Collect box](#)

[Step 3: Selecting the structure properties for the elements of the Collect box](#)

[Step 4: Selection of the document types that are to be exported in the Collect box](#)

[Step 5: Starting the export of the selected elements and settings in the Collect box](#)

Detailed information can be found in the following chapters.

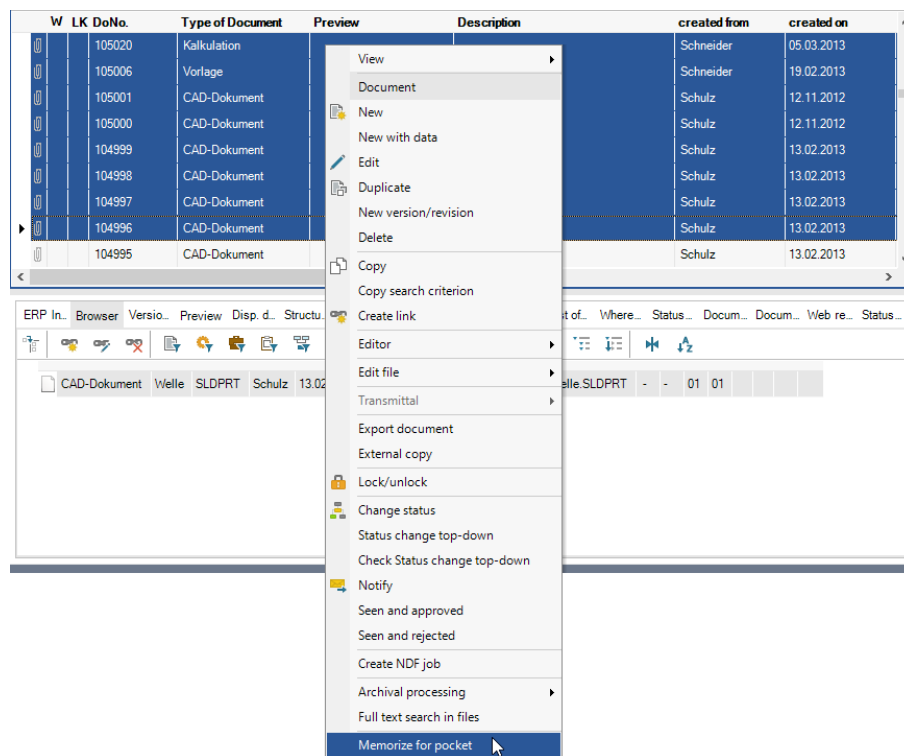
2.1.1

Step 1: Selecting the PRO.FILE objects for the Collect box

First, you have to select the PRO.FILE objects that you want to export to PRO.FILE Pocket.

Proceed as follows:

1. Select (in PRO.FILE) the part, project or document that you want to export, and highlight the desired data records.
2. Now, using the context menu of the right mouse button, select the function "Memorize for Pocket".



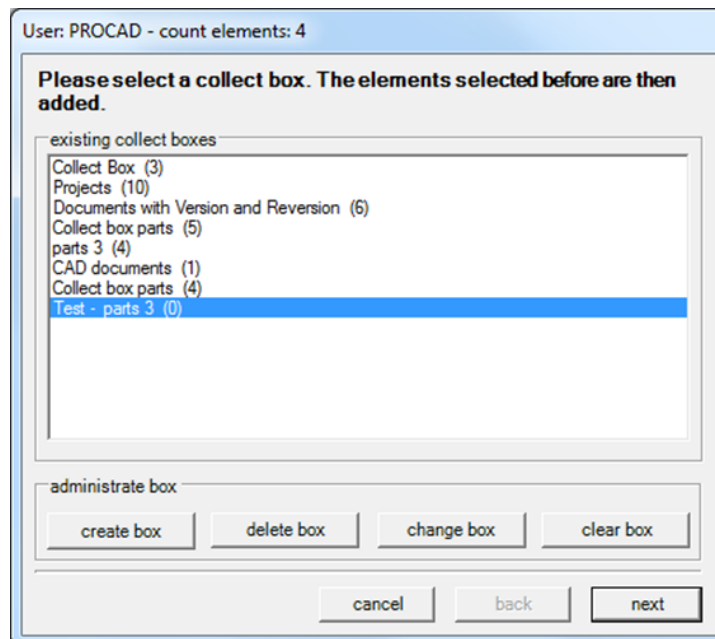
⇒ All highlighted data records are now "memorized" **including** the dependent structures, so that they can be taken over into the Collect box.

⇒ The window for the creation, editing or expanding the PRO.FILE Collect box will now appear.

2.1.2

Step 2: Selecting the Collect box

After [Step 1: Selecting the PRO.FILE objects for the Collect box](#) and the call up of the function "Memorize for Pocket" the window for the creation and administration of the Collect box will appear.



The Collect box for the pre-selected PRO.FILE objects can be selected in this window. The PRO.FILE objects that were previously selected are then added to the Collect box. The number of previously selected elements is shown in the title bar of the window as confirmation.

**Note: Amount of files**

The amount of files that can be exported in one go from a collect box depends, among others, from your hardware environment and configuration.

If you receive the message "Out of memory" during the export from a collect box, please reduce the amount of files.

The following possibilities are available:

- You can select an **existing Collect box**:

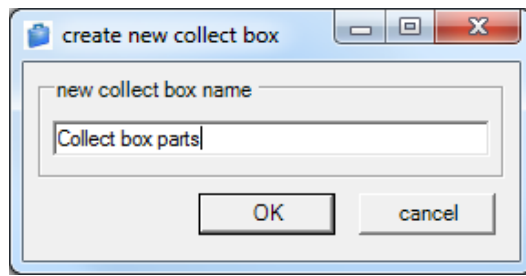
Previously created Collect boxes are displayed in the list. They are displayed in chronological order according to the date of creation. The number that follows each of the names of the Collect boxes refers to the amount of PRO.FILE elements that are contained in the Collect box.

To select a Collect box highlight the one required from the list.

- You can **create a new Collect box**:

Proceed as follows

1. To do this, click on the button "Create Box".
- ⇒ A new window will open in which you can enter the name for the new Collect box:



2. Enter the name that the new Collect box is to be given, and confirm the entry with <OK>.
- ⇒ The newly created Collect box will now appear in the list, and can be highlighted so that it can take on the PRO.FILE-objects.

When the desired Collect box is highlighted, continue with the <Next> button.

- ⇒ The next window will appear for [Step 3: Selecting the structure properties for the elements of the Collect box.](#)



Note:

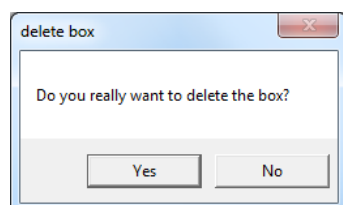
If PRO.FILE objects are taken on into an existing Collect box, and this Collect box already contains these objects, the existing objects will be replaced by the newly selected objects.

Other possibilities for managing the Collect boxes

Other management options for the Collect boxes are available in the displayed window:

- **Delete box:**

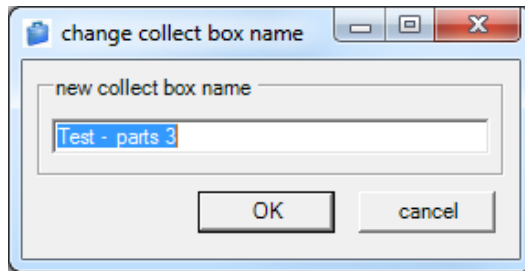
This function deletes the selected Collect box. This action is irreversible. The following request message must be confirmed with "Yes" if you want to delete the box.



The deletion process cannot be undone!

- **Change box:**

Select this button to edit the name of the existing Collect box.



Enter the new name for the Collect box in the field that appears, and confirm with <OK>.

- **Empty box:**

This button empties the current Collect box, and deletes all of its contents. The emptying of the Collect box is final, and **cannot be undone!** The Collect box is empty after the function has been used.

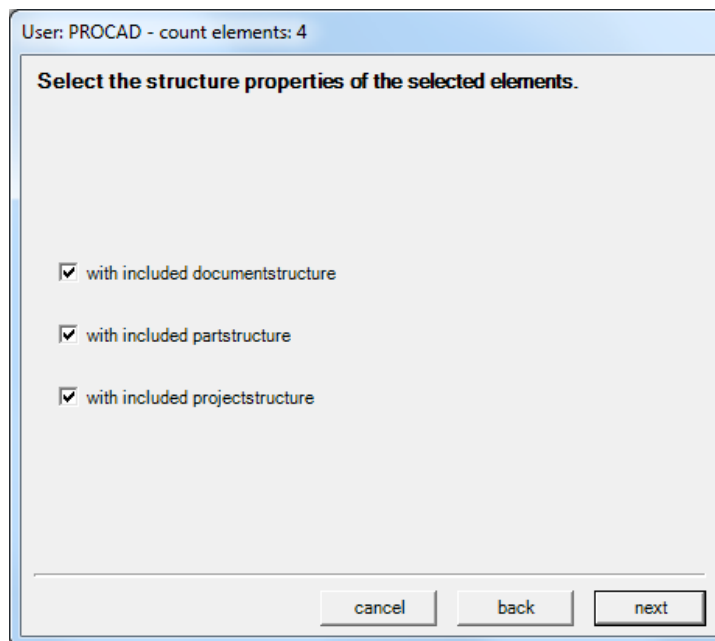
2.1.3

Step 3: Selecting the structure properties for the elements of the Collect box

After [Step 2: Selecting the Collect box](#) has been completed, the selection of the structure elements that are to be taken on into the Collect box must be made.

In this way you can limit the size and type of the PRO.FILE objects with their attached structures of the noted parts that you want to export.

⇒ The following selection window appears:



You have the possibilities to over the elements memorized for PRO.FILE Pocket:

- with included document structure
- with included part structure
- with included project structure

in the Collect box.

Activate/deactivate the relevant control boxes, and confirm the selection with <Next>.

⇒ The window for the [Step 4: Selection of the document types that are to be exported in the Collect box](#) will now appear.

2.1.4

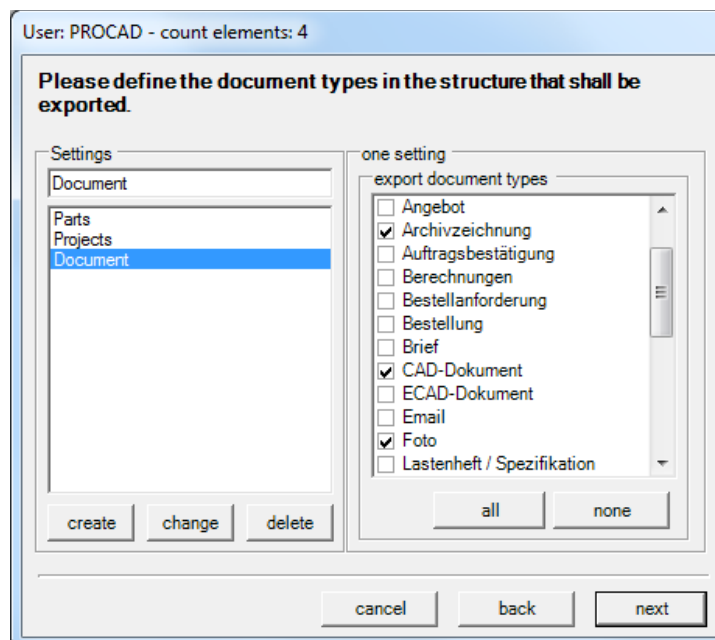
Step 4: Selection of the document types that are to be exported in the Collect box

When putting together the Collect boxes for PRO.FILE Pocket, an additional restriction of the documents to be exported documents can be made.

It is possible to select the PRO.FILE document types that should be exported in the structure.

So that this selection does not have to be made over and over again, it can be saved in so called settings record, and called up whenever required.

The following window appears:

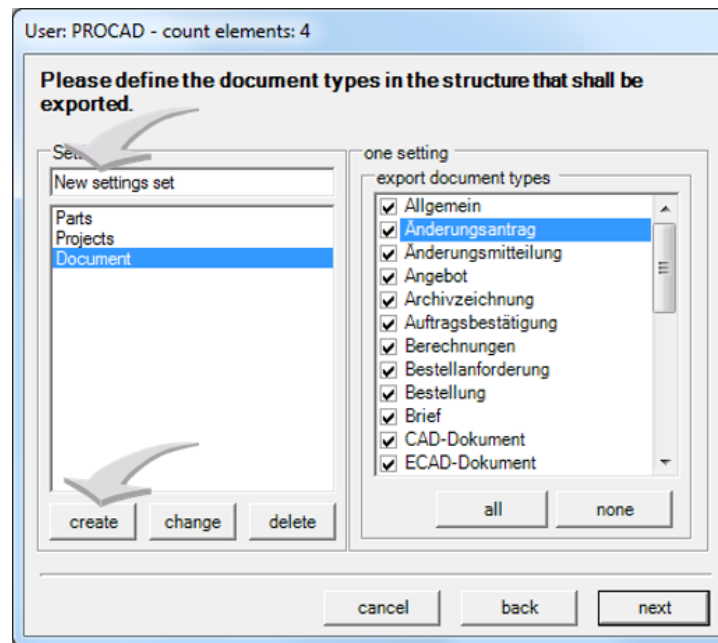


This window is used to create or select settings records. The setting record for the selection list is defined for the document types to be exported.

The window lists the existing setting records on the left hand side. Here the commands for the setting records are:

- **Create:**

To create a new setting record, enter the name of the desired setting record in the entry field above the list on the left hand side.



Click on "create", to save this setting record. Then assign the setting record to the document types to be exported.

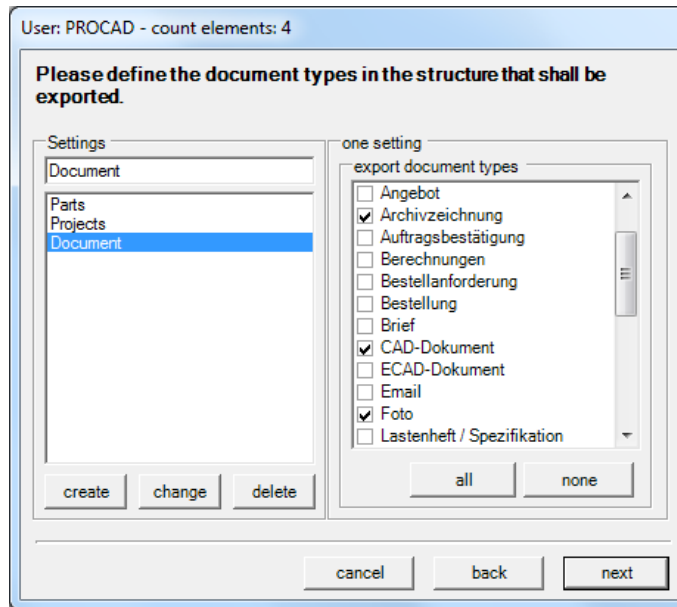
- **Change:**

The button "Change" is used to change the name of an existing setting record. The properties of the document types to be exported stay the same for the setting record.

- **Delete:**

This button deletes the setting record. This command cannot be reversed!

The right hand side of the screen contains the document types to be exported for the corresponding setting record that is highlighted on the left hand side.



A setting record must be highlighted in the left hand list.

The desired document types that are to be exported can then be selected for the highlighted settings record from the right hand list. To select the document types, activate or deactivate the checkboxes in the right hand list.

To speed up the selection process, the buttons "All" (select all document types) and "None" (select none of the document types) can be used.



Note:

The list of document types corresponds to the document types configured in PRO.FILE via the PRO.FILE Management Console.

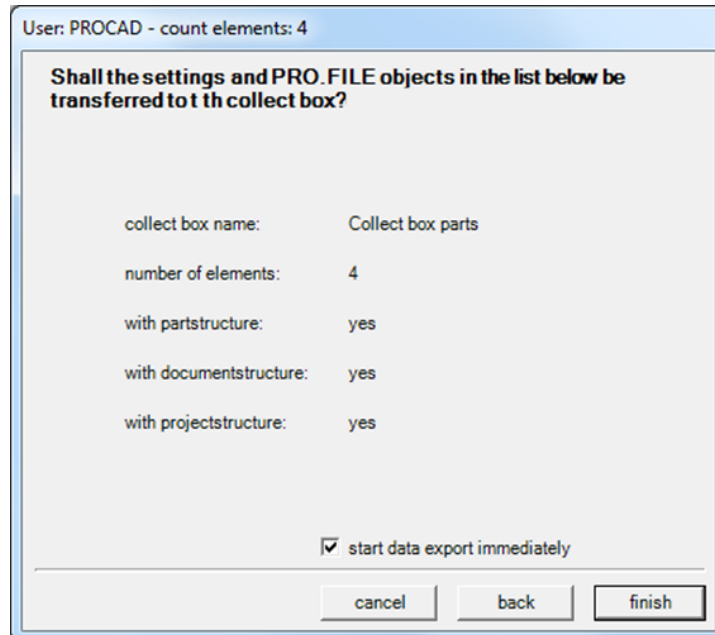
- Once the desired setting record for the document types to be exported has been created or selected, confirm the settings with <Next>.
- ⇒ The window for [Step 5: Starting the export of the selected elements and settings in the Collect box](#) will appear.

2.1.5

Step 5: Starting the export of the selected elements and settings in the Collect box

To finalize the making up of the PRO.FILE objects in the Collect box the following overview mask will appear.

You can check your selections and settings one last time.



To now start the direct data export of the selected PRO.FILE objects activate the control box **"Start data export immediately"**. You can also carry out the data export at a later date via the **"File"** menu of PRO.FILE using the command **"Export to Pocket"**.

**Note: Amount of files**

The amount of files that can be exported in one go depends, among others, on your hardware environment and configuration.

If you receive the message "Out of memory" during export, please reduce the amount of files.

Information on the export of the Collect box can be found in the chapter: ["Exporting a Collect box"](#).

- If the settings are to your satisfaction, confirm the mask with **"Finish"**.
- If you wish to make any changes to your entries and selections click on the **"Back"** button.

2.2 Exporting a Collect box

The Collect boxes that are created and filled for the Pocket export, can be exported at any time. Every Collect box is always available to be exported as many times as required.

During the export:

- All elements that are contained in the Collect box are copied to the file system of the computer or to a mobile memory drive.
- The metadata of the parts documents and projects are embedded in an HTML-page in XML-format.

This data is then saved to a directory that you can determine, forming a PRO.FILE Pocket. This pocket can then simply be transferred to another computer or memory drive. This for example can be carried out using the windows Explorer.

The PRO.FILE objects, parts, documents and projects that are stored in a Collect box are always at the up to date status as the data in PRO.FILE. They have the values and contents they had in PRO.FILE at the moment of exportation.

Using the Pocket Viewer it is possible to view the exported objects and their structure even without PRO.FILE access.

All part master data, documents and projects that are exported using the PRO.FILE Pocket are not locked in your database. They can be edited without limitation.

Proceed as follows

[Step 1: Starting the Pocket export](#)

[Step 2: Selecting the Collect box to be exported](#)

[Step 3: Selecting the target folder](#)

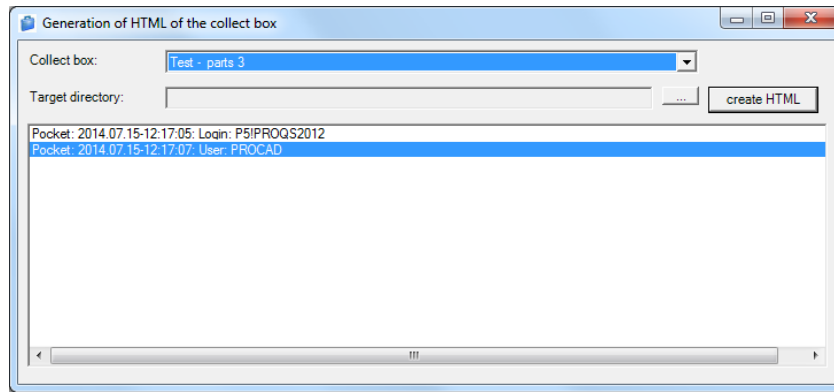
[Step 4: Generating the PRO.FILE Pocket](#)

Detailed information can be found in the following sub-chapters.

2.2.1 Step 1: Starting the Pocket export

There are two ways of calling up Pocket export:

- You activate the option "**Start data export immediately**" directly when creating the Collect box. In this way, directly after the creation of the Collect box the data export is started.
 - You call up the function "**Export to Pocket**" from the file menu in PRO.FILE.
- ⇒ The window for the HTML-generation of the Collect box appears.



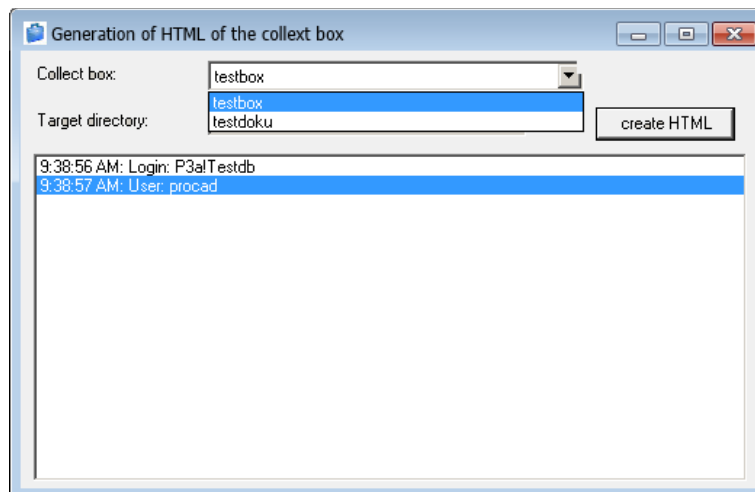
You can now continue with "Step 2: Selecting the Collect box to be exported".

2.2.2

Step 2: Selecting the Collect box to be exported

You must now select the Collect box that is to be used for the Pocket-Export from the window "Generation of HTML of the collect box".

This is done using the drop-down list in the field "Collect box".



Please select the required Collect box.



Note:

In the field "Collect box" the last exported Collect box is always shown to simplify the regular transfer of data.

Especially when export is to be started directly after the Collect box has been created, you should make sure that the correct Collect box is selected.

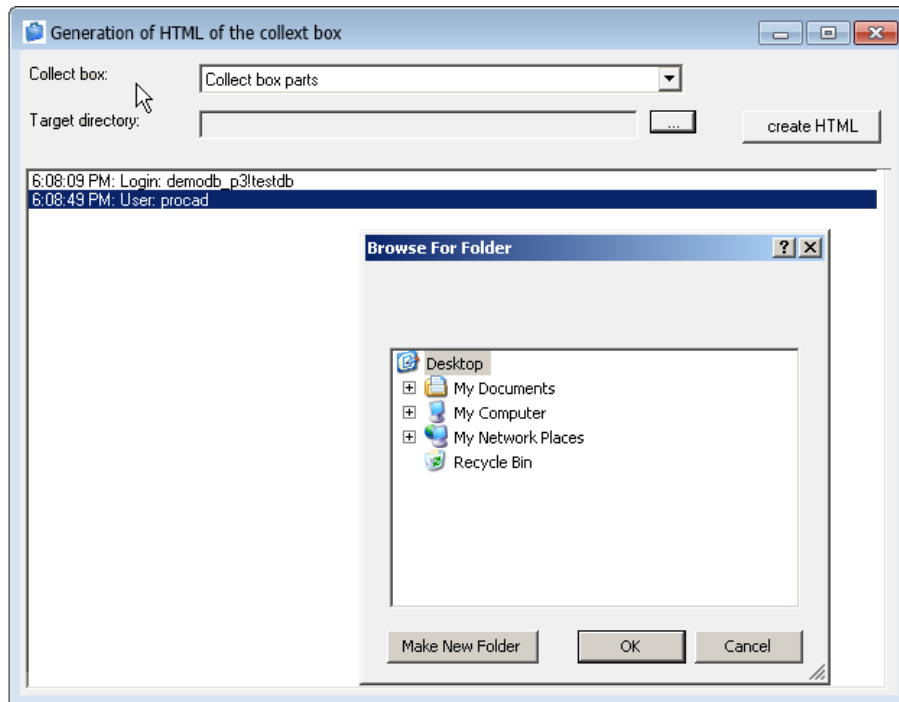
You now come to "[Step 3: Selecting the target folder](#)".

2.2.3 Step 3: Selecting the target folder

You can now select the folder in file system in which the PRO.FILE Pocket is to be stored.

The Collect box will be exported to this directory. A new folder is then created in the directory for the Collect box and is given the name of the Collect box.

Use the button  to select the required directory.



Confirm your selection for the destination directory in the window "Browse for Folder" with <OK>.

Now proceed to "[Step 4: Generating the PRO.FILE Pocket](#)".

2.2.4 Step 4: Generating the PRO.FILE Pocket

All settings have now been made for the generation of the PRO.FILE Pocket.

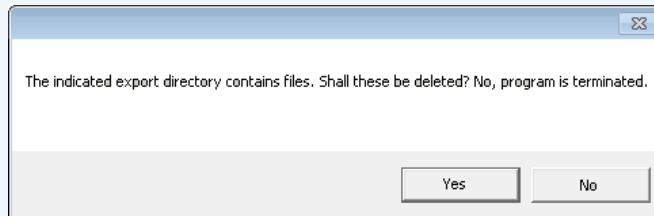
During the generation all of the elements contained in the Collect box are put into the selected directory as copies. In addition, all metadata of the parts, documents and projects is embedded in an HTML page in XML format, so that they can be viewed with their corresponding structures using the Pocket Viewer.

To start the generation click on the button "Create HTML".



Note:

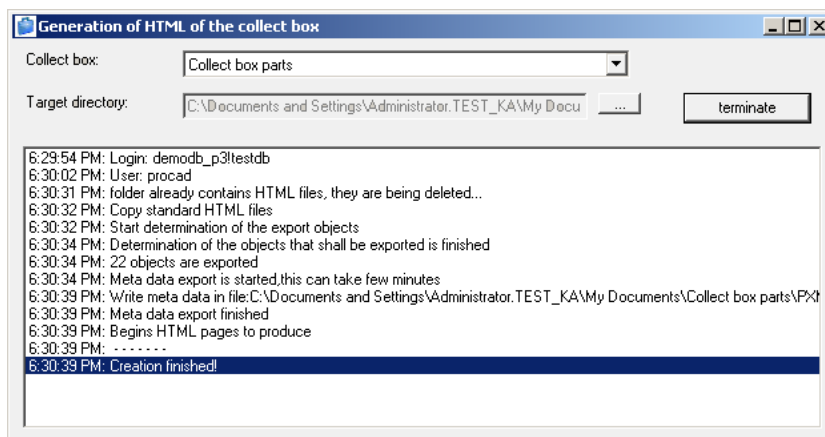
The export can only be carried out when the pocket in the selected directory is empty. , If this is not the case, a message will appear asking whether the existing data should be deleted.



To continue with the export click on "Yes". The data that already exists in the directory will then be **irreversibly** deleted!

To avoid this data being deleted select "No". You can e.g. select a different target folder and then call up the export again at a later time.

The generation is now started. The progress is shown in the generation window.



**Note: Amount of files**

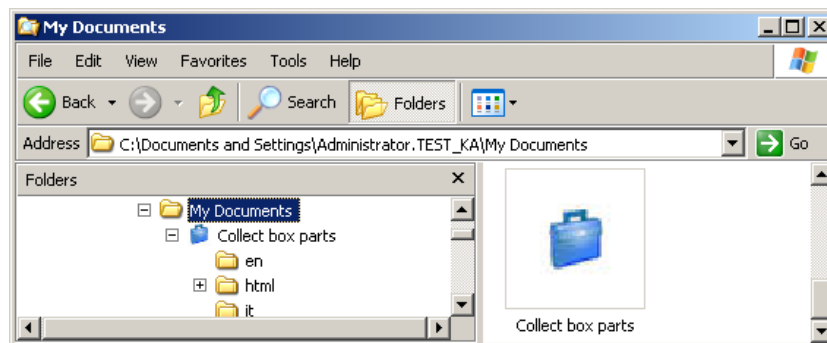
The amount of files that can be exported in one go depends, among others, on the hardware environment and configuration.

If you receive the message "Out of memory" during export, please reduce the amount of files.

After the generation has been successfully completed the message "**Creation finished**" is displayed in the generation window.

Your pocket with the selected PRO.FILE objects and data is now ready to be retrieved.

The pocket can be found in the directory that you entered as the destination directory during the generation. It has the name of the exported Collect box.



The pocket can then be transferred to other drives from this destination directory.

**Note:**

When transferring the pocket to another directory or to another drive, you must make sure that the entire pocket folder is copied. If this is not done, the data cannot be correctly viewed later in the Pocket Viewer.

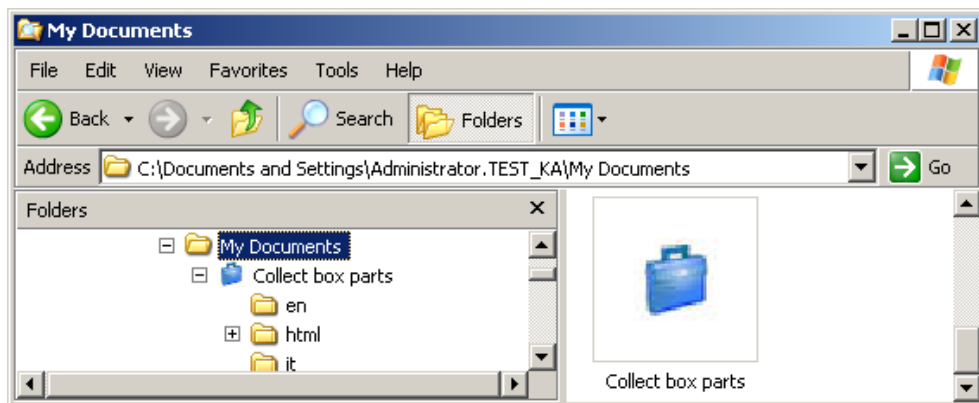
The data is now available to you offline. For information on viewing this offline data refer to the chapter "[Using the Pocket Viewer](#)".

2.3 Using the Pocket Viewer

After the creation and the export of a Collect box, the PRO.FILE pocket is available to you offline.

The pocket you require can be found in the destination directory that was determined for the export of the Collect box.

You can now select this pocket freely, and transfer it as required.



Note:

When transferring the pocket to another directory or to another drive, you must make sure that the entire pocket folder is copied. If this is not done, the data cannot be correctly viewed later in the Pocket Viewer.

Using the Pocket Viewer it is possible to view export data offline without PRO.FILE and database access.

All information regarding the handling of the Pocket Viewer can be found in the following sub-chapters:

- [Calling up the Pocket Viewer](#)
- [The functions of the Pocket Viewer](#)



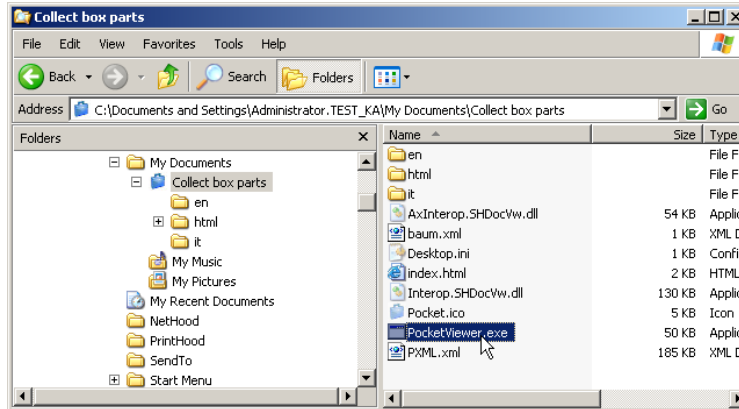
Note: Access to the PRO.FILE online help

When PRO.FILE Pocket is used in offline mode, the user cannot access the PRO.FILE online help. For offline operation, the manual "Operation PRO.FILE Pocket" is available as PDF, which can be downloaded by the administrator from the PRO.FILE support portal.

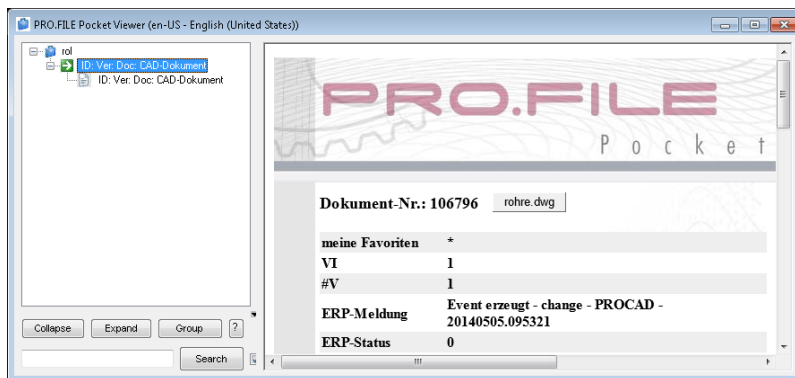
2.3.1 Calling up the Pocket Viewer

The file "PocketViewer.exe" is present in your pocket directory. This file is laid down for each individual pocket, and guarantees the mobility of the pocket.

To start the Pocket Viewer activate the file "PocketViewer.exe" with a double click.



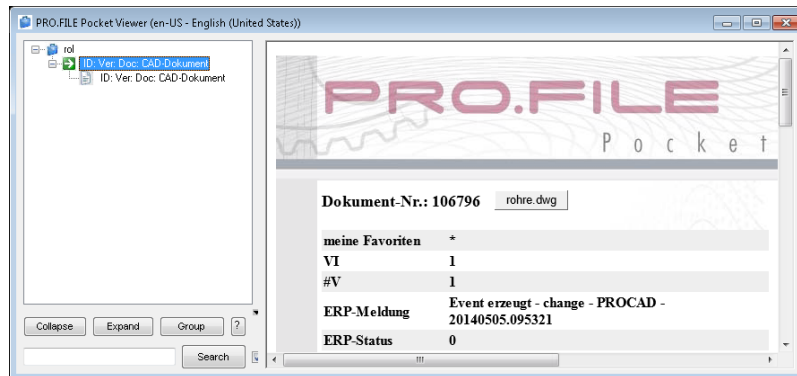
⇒ The Pocket-Viewer will open:



The possibilities in this window are detailed in the chapter "[The functions of the Pocket Viewer](#)".


2.3.2 The functions of the Pocket Viewer

The Pocket Viewer is used for the offline viewing of the exported pocket data from PRO.FILE.



The PocketViewer-window is split into two parts:

- On the **left-hand side** of the Pocket Viewer you can find the structure of the exported PRO.FILE objects. This structure is the same as that found in the PRO.FILE database. Using the buttons "Collapse", "Expand" and "Group" you can adjust the display of the structure as required.
The grouping can be released by carrying out an empty search. To do so leave the search field empty and click on the button "Search".
- On the **right-hand side** you have the metadata of the selected PRO.FILE objects. The display is based on the configuration of the format in PRO.FILE as well as the configuration of the file "HTMLSettings.xml" for the Pocket.

The data that refers to the object structure that is being displayed is marked with the active symbol  **Doc:CAD-Dokument**.

PRO.FILE softlinks concerning CAD documents will be exported and recursions will be identified. As soon as a recursive element is identified, the processing of that very sector ends.

You can call up the PRO.FILE Pocket GUI in several languages (see chapter:

[Language](#) settings).

The search function of the Pocket Viewer

The search field of the Pocket Viewer can be used to carry out a search in the metadata of the pocket. This search field is in the bottom left hand corner of the viewer. You can carry out a full text search of the metadata. The results are displayed in a list.



Enter the search strings in the field, and start the search by clicking on the button "Search".

By using the "|" -symbol the search function of the PocketViewer also tolerates alternative expressions. Here are some examples:

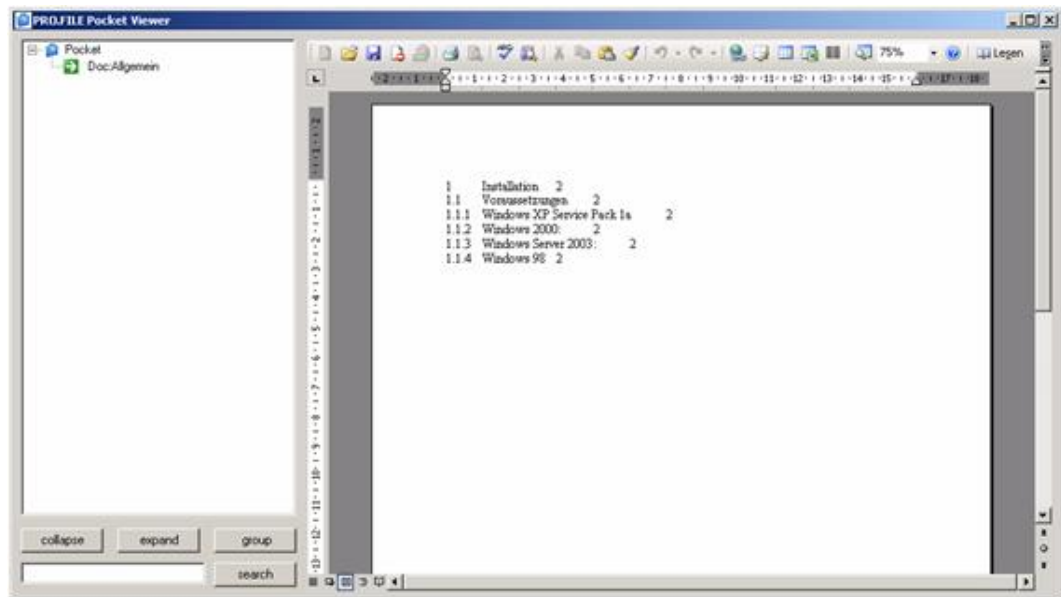
- "ABC|abc" means "ABC" or "abc", but not e.g. "Abc".
- "a+" tolerates an "a", an "aa" or an "aaaa", etc.
- Whereas "[ab]+" tolerates an "a", "b", "aa", "baab", etc.
- Searching for "[0-9]{2,5}" provides you "13", "28333", "123", but not "0", "123123223" etc. The result will provide all expressions with a length between 2 and 5 digits where the digits range from 0 to 9.

There are predefined classes of characters. The most important classes are:

- `\d` : a number [0-9]
- `\D` : no number [^0-9]
- `\w` : a letter, a number or an underscore [a-zA-Z_0-9]
- `\W` : no letter, no number and no underscore [^\w]
- `\s` : whitespace-characters, mostly [\f\n\r\t\v]
- `\S` : all chars except whitespace-characters [^\s]

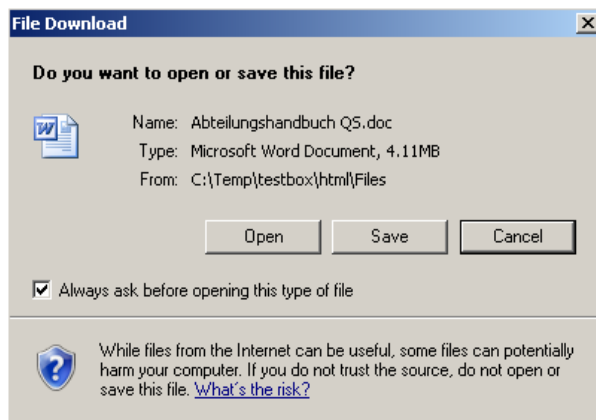
The search results can be cancelled by running an empty search. To do so leave the search field empty and click on the button "Search".

Calling up files: If a file is saved to a PRO.FILE object, it can be called up using the Pocket Viewer. For this, the button with the filename appears on the right hand side of the screen. When you click on the filename button, the Pocket Viewer displays the attached data:



To call up a file the relevant viewer or program must already be installed. Viewing e.g. a SolidWorks drawing without the SolidWorks Viewer is not possible.

If this requirement is not fulfilled, the file is offered for saving.



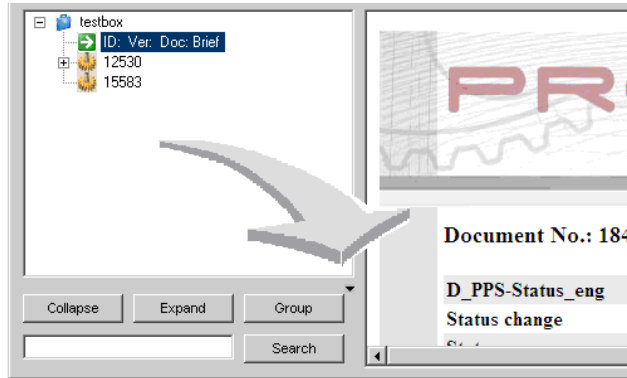
Attention:


Please note: If files exported for PRO.FILE Pocket are edited in an environment independent from PRO.FILE, the changes cannot be taken on in PRO.FILE. This is not where PRO.FILE Pocket should be used. These changed files must be re-checked into PRO.FILE for the changes to be taken on.

Language settings The GUI of the PRO.FILE Pocket Viewer can be displayed in the following languages:

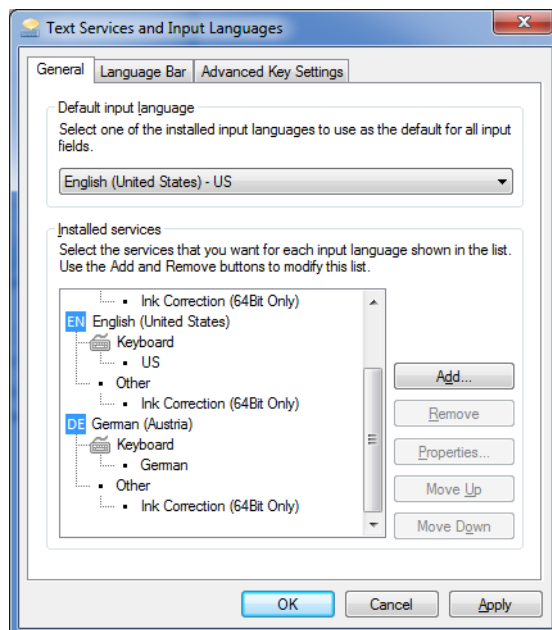
Czech, Danish, Dutch, English, Finnish, French, German, Hungarian, Italian, Norwegian, Polish, Russian, Slovakian, Slovenian.

To switch between the languages, proceed as follows:



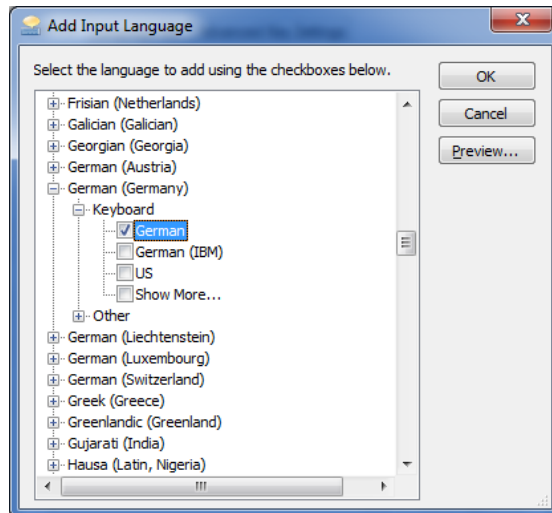
1. Click on the button .

⇒ The menu "Text Services and Input Languages" will appear.

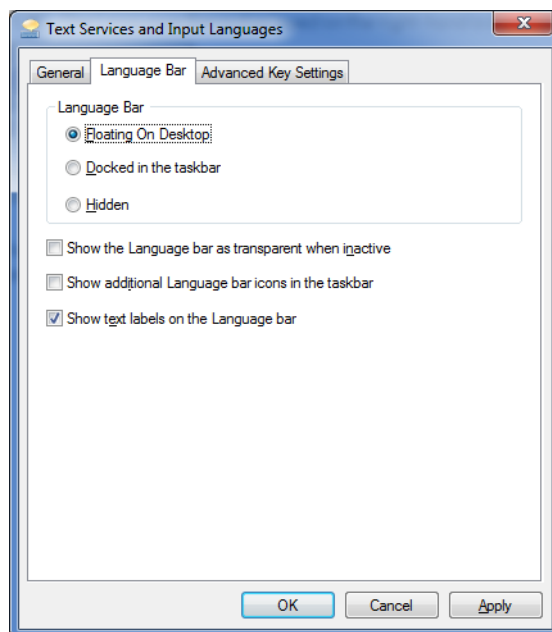


2. Click on "Add...", if the desired language is not listed in the section "Installed services".

3. Select the desired language in the line "Add Input Language" and confirm with "OK".



4. Open the menu "Language Bar..."



5. Set the checkmark next to "Floating on Desktop" or "Docked in the taskbar" and confirm with "OK".

⇒ The Language Bar is displayed on the right-hand side of the task bar.



Via the Language Bar you can now switch between the languages for the active PRO.FILE Pocket Viewer window (the window must be on top).

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