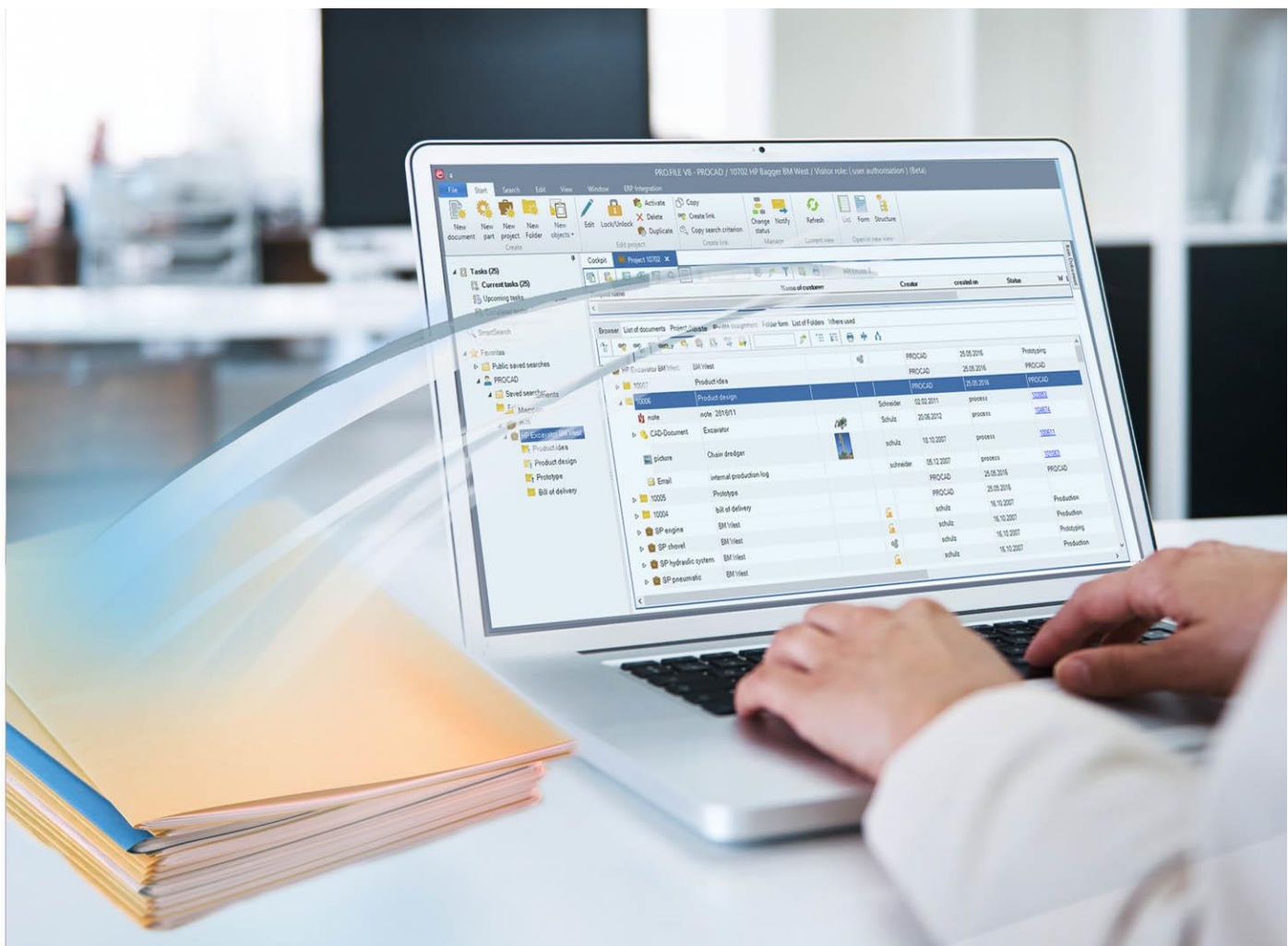


# Operation of the Integration PRO.FILE - Outlook VSTO

PRO.FILE Release 8.7  
March 2017



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## Table of contents

Table of contents .....	3
About this manual.....	5
<b>1 The Integration PRO.FILE – Outlook VSTO .....</b>	<b>6</b>
<b>2 Starting the integration PRO.FILE – Outlook VSTO.....</b>	<b>7</b>
<b>3 Usage cases of the PRO.FILE – Outlook Integration .....</b>	<b>8</b>
3.1 Saving incoming e-mails to PRO.FILE .....	8
3.1.1 Saving incoming e-mails with attachments.....	9
3.1.2 Saving incoming e-mails without attachments .....	10
3.1.3 Saving only the attachments of an incoming e-mail .....	11
3.2 Managing outgoing e-mails in PRO.FILE .....	12
3.2.1 Saving a new e-mail in PRO.FILE and sending it.....	13
3.2.2 Saving a new e-mail as draft in PRO.FILE .....	14
3.2.3 Inserting a file from PRO.FILE as attachment into a new e-mail .....	16
3.2.4 Inserting a document from PRO.FILE as Link into a new e-mail .....	16
3.2.5 Accessing e-mails saved in PRO.FILE .....	18
3.2.6 Opening an e-mail from PRO.FILE .....	18
3.2.7 Creating an new e-mail from draft in PRO.FILE .....	19
3.2.8 Displaying a document description of an e-mail attachment saved in PRO.FILE .....	20
3.3 Using documents from PRO.FILE in the calendar and task management of Outlook.....	20
3.3.1 Inserting a file from PRO.FILE into a task as attachment .....	21
3.3.2 Linking a document description from PRO.FILE to a task .....	22
3.3.3 Inserting a file from PRO.FILE to an appointment as attachment.....	23
3.3.4 Linking a document description from PRO.FILE to an appointment .....	23
<b>4 Function overview of the integration PRO.FILE – Outlook VSTO .....</b>	<b>25</b>
4.1 Wizard "Save e-mail attachments to PRO.FILE" .....	25
4.2 Selection "Which version to show" .....	26
4.3 The function "Select document from list" .....	27
4.4 The PRO.FILE Checkout wizard .....	28
4.5 Extras.....	30
4.5.1 Help .....	30

4.5.2 PROCAD on the web ..... 32

4.5.3 About ..... 32

**5 Overview of menus and buttons..... 34**

5.1 Buttons in the menu of the integration..... 34

5.2 Functions in the context menu of Outlook ..... 36

**6 Index..... 38**

## 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 The Integration PRO.FILE – Outlook VSTO

E-mail is business mail and contains business relevant documents that require the same treatment as other forms of business correspondence. E-mails initiate business processes or control their workflows. Therefore, this electronic data must be distributed, made available and also archived according to similar or identical rules as other business mail.

Storing e-mails and their attachments in the document management system PRO.FILE contributes to the systematic organization of business processes and ensures fast retrieval and secure archival of the information at any time.

The integration into Microsoft Outlook allows electronic correspondence and attachments to be linked to all projects or project specific documentation. The process of storing begins directly in the Outlook user interface. The format and the structure of the stored object inside the "electronic vault" of PRO.FILE are identical to the original mail.

## Benefits

- Fast retrieval of business relevant e-mails from the own mailbox and from mailboxes of other users
- Safe deposit and vaulting of e-mails
- Compliance to laws and regulations for document storage and archiving
- Avoids overflowing mail boxes of the users
- Relieves IT departments from long backup processes and restores of e-mail servers by reducing the volume of data stored in mail accounts
- Allocation and consolidation of mails and attachments to your projects and products

Furthermore, the Integration PRO.FILE – Outlook VSTO offers additional options:

- **Simple usage via ribbons**  
You can now see the functions of the Outlook integration at one glance.
- **Check-in of attachments via checkboxes**  
Select the attachments you want to save with a checkmark and display a preview of the attachments.
- **Check-in of several e-mails with one click**  
Select several e-mails in Outlook. They will then all be checked-in at once.
- **Use of e-mail templates in your company CI**  
With the function "New from template" you start a new e-mail in your specific company layout.
- **Optimized versioning of e-mails and attachments**  
If you have received an e-mail from a sender in a modified version, you can store both e-mails within a version chain.

## 2 Starting the integration PRO.FILE – Outlook VSTO

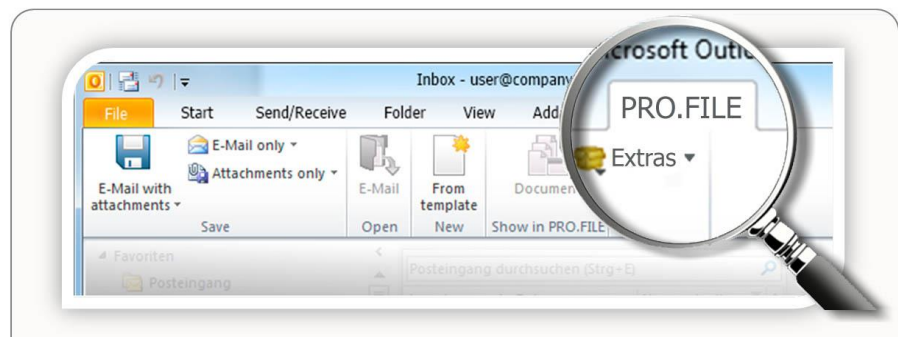


### Note: Prerequisite for the use of the Integration PRO.FILE – Outlook

To use the functions described in this manual, the PRO.FILE Windows Client and the integration PRO.FILE – Outlook have to be installed on your computer. Furthermore, you require a user access to be able to login to PRO.FILE. Please contact your administrator in case of further questions.

Access to the integration is made via the tab "PRO.FILE" in the menu bar of Microsoft Outlook.

This tab contains all buttons for the access to functions described in this manual.



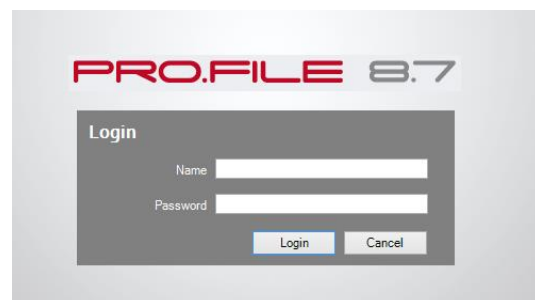
For the use of the functions the PRO.FILE Windows Client has to be started or will rather be run automatically.

To start your PRO.FILE Windows Client, please make a login.

Enter your PRO.FILE user name and corresponding password.

Confirm with <Login>

The functions of the integration can now be used.



### Note: No login screen is displayed?

If the login screen is not displayed upon start of PRO.FILE but the PRO.FILE GUI is displayed immediately, the auto login function is activated at your workstation. In this case, PRO.FILE uses your Microsoft Windows user login, so that no additional login in PRO.FILE is required and you can start your work in PRO.FILE immediately.

## 3 Usage cases of the PRO.FILE – Outlook Integration

This chapter lists the most relevant usage cases of the integration PRO.FILE – Outlook VSTO. For each usage case, the proceeding is outlined on a step-by-step basis.

More detailed explanations of single steps and functions with additional information can be found in the following chapter "[Function overview of the integration PRO.FILE – Outlook VSTO](#)".

The usage cases are divided into four subject areas:

- [Saving incoming e-mails to PRO.FILE](#)
- [Managing outgoing e-mails in PRO.FILE](#)
- [Accessing e-mails saved in PRO.FILE](#)
- [Using documents from PRO.FILE in the calendar and task management of Outlook](#)

### 3.1 Saving incoming e-mails to PRO.FILE

If you want to save information and data from e-mails in your inbox to PRO.FILE, there are three basic usage cases:

- [Saving incoming e-mails with attachments:](#)  
The complete received e-mail and its attachments are saved to PRO.FILE. In case of several attachments, you can select the attachments to be saved.
- [Saving incoming e-mails without attachments:](#)  
Only the e-mail is saved to PRO.FILE, but not the attachments. The attachments remain unchanged in the body of the E-Mail.
- [Saving only the attachments of an incoming e-mail:](#)  
Only the attachments of an e-mail are saved to PRO.FILE, but not the e-mail itself. In case of several attachments, you can select the attachments to be saved.



### 3.1.1 Saving incoming e-mails with attachments

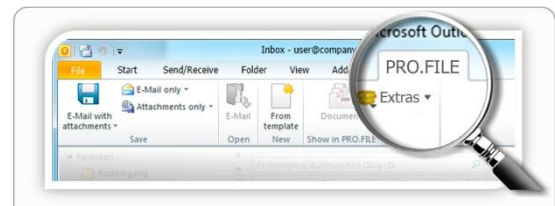
The situation:

You want to save an e-mail in your Microsoft Outlook inbox completely to PRO.FILE – i.e. the entire e-mail, including its header, body and the attachments.

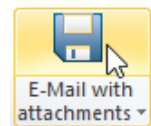
- ⇒ In case of several attachments, you can select the attachments to be saved.
- ⇒ The body of the e-mail is afterwards no longer displayed in the inbox – instead the reference to the document ID in PRO.FILE and a corresponding link is displayed.

Proceeding:

1. Select the e-mail to be saved to PRO.FILE from the inbox.
2. Select the tab "PRO.FILE" from the Outlook menu bar.



3. Select the function button <E-Mail with attachments – Create new>.
4. (Optional the function <Select document from list> is available as well. See [The function "Select document from list"](#))



- ⇒ The wizard "Save E-Mail with attachments to PRO.FILE (Create new)" is displayed.  
(For detailed information see chapter "[Wizard "Save e-mail attachments to PRO.FILE"](#)").
- 5. Select the attachments you want to save to PRO.FILE by activating the corresponding checkbox ☒ of each attachment (For detailed information see chapter "[Wizard "Save e-mail attachments to PRO.FILE"](#)").




#### Note:

All attachments that are not selected in the wizard are not saved to PRO.FILE and thus remain as attachments with the e-mail.

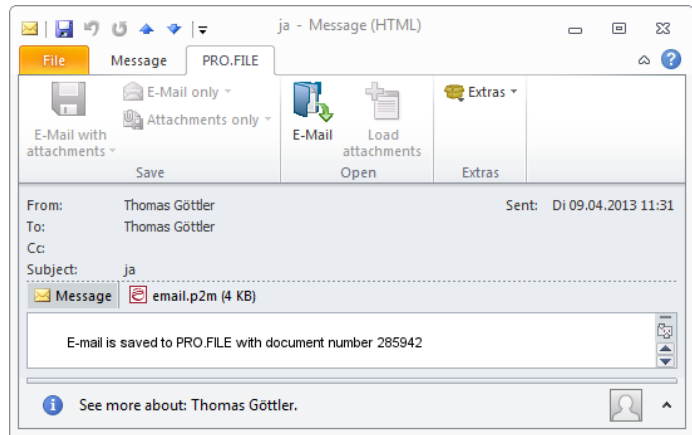
- ⇒ The PRO.FILE Check-In wizard is displayed.
- 6. Enter the data for the document description of the e-mail message to be saved.  
(For detailed information see the manual "PRO.FILE advanced Creating, managing and changing PRO.FILE objects")
- 7. Confirm with <Finish>.
- ⇒ The Check-In wizard is now displayed consecutively for each selected attachment. The name of the attachment currently handled by the Check-In wizard is displayed in the title bar of the wizard.

8. Fill in the document description for each selected e-mail attachment.
  9. Confirm with <Finish>.
- ⇒ The document descriptions created for the saved attachments are automatically linked in PRO.FILE to the document description of the e-mail.
- ⇒ The saving process is thus finished.
- ⇒ The body of the e-mail in your inbox is now replaced by a reference to the corresponding document in PRO.FILE.

Access to the document description is also possible via a double-click on the link

 email.p2m (4 KB)

The saved attachments can be found in the structure of the document description.



### 3.1.2

#### Saving incoming e-mails without attachments

The situation:

You want to save an e-mail in your Microsoft Outlook inbox – but only with header and body – without attachments.

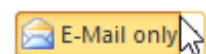
- ⇒ You do not want to save the attachments, e.g. because they do not contain relevant information (example: vcf-card file or advertisement).
- ⇒ The body of the e-mail is afterwards no longer displayed in the inbox – instead the reference to the document ID in PRO.FILE and a corresponding link is displayed.

Proceeding:

1. Select the e-mail to be saved to PRO.FILE from the inbox.
2. Select the tab "PRO.FILE" from the Outlook menu bar.




3. Select the function button <E-Mail only – Create new> (Optional the function <Select document from list> is available as well. See [The function "Select document from list"](#))

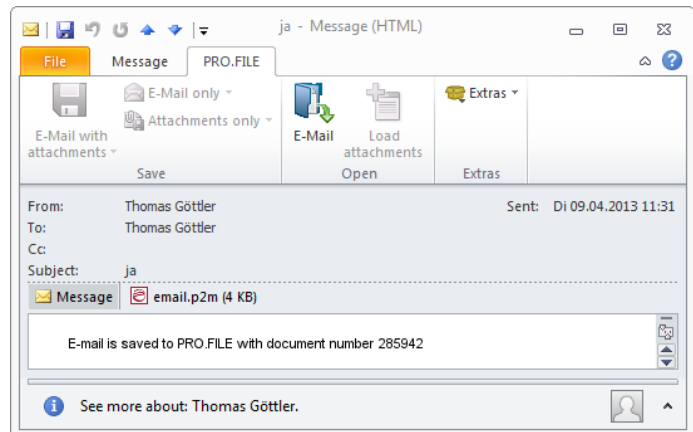


- ⇒ The PRO.FILE Check-In wizard is displayed.
- 4. Enter the data for the document description of the e-mail message to be saved.  
(For detailed information see the manual "PRO.FILE advanced Creating, managing and changing PRO.FILE objects").
- 5. Confirm with <Finish>.
- ⇒ The saving process is thus finished.
- ⇒ The body of the e-mail in your inbox is now replaced by a reference to the corresponding document in PRO.FILE.

Access to the document description is also possible via a double-click on the link

 **email.p2m (4 KB)**

The saved attachments can be found in the structure of the document description.



### 3.1.3

#### Saving only the attachments of an incoming e-mail

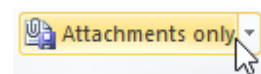
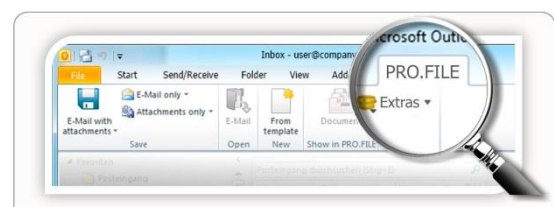
The situation:

You want to save the attachments of an e-mail in your Microsoft Outlook inbox, but without the actual e-mail (header, body) itself.

- ⇒ In case of several attachments, you can select the attachments to be saved.
- ⇒ The body of the e-mail remains unchanged in your inbox.

Proceeding:

1. Select the e-mail containing the attachments to be saved to PRO.FILE in your inbox.
2. Select the tab "PRO.FILE" from the Outlook menu bar.
3. Select the function button <Attachments only – Create new>.
4. (Optional the function <Select document from list> is available as well. See [The function "Select document from list"](#))



- ⇒ The wizard "Save only attachments to PRO.FILE" is displayed.
5. Select the attachments you want to save to PRO.FILE by activating the corresponding checkbox ☒.  
(For detailed information see chapter [Wizard "Save e-mail attachments to PRO.FILE"](#))

**Note:**

All attachments that are not selected in the wizard are not saved to PRO.FILE and thus remain as attachments with the e-mail.

- ⇒ The PRO.FILE Check-In wizard is displayed.
6. Fill in the document description for each selected e-mail attachment. (For detailed information see the manual "PRO.FILE advanced - Creating, managing and changing PRO.FILE objects").
- ⇒ The Check-In wizard is now displayed consecutively for each selected attachment. The name of the attachment currently handled by the Check-In wizard is displayed in the title bar of the wizard.
7. Confirm with <Finish>.
8. The saving process is thus finished.

## 3.2

### Managing outgoing e-mails in PRO.FILE

Before the sending of a new e-mail the integration offers you various options: You can save the information and attachments in PRO.FILE or you can insert documents or links to document descriptions from PRO.FILE into the e-mail.

The following usage cases are the most frequent:

- [Saving a new e-mail in PRO.FILE and sending it:](#)  
You want to save a newly created e-mail with attachments to PRO.FILE and send it immediately after the saving process to the addresses specified in the header.
- [Saving a new e-mail as draft in PRO.FILE:](#)  
You do not want to send a newly created e-mail, but instead you want to save it in PRO.FILE as a draft. An e-mail can thus be sent at a later point in time or be used as constant temple for future e-mails.
- [Inserting a file from PRO.FILE as attachment into a new e-mail:](#)  
You want to insert a file from PRO.FILE into a newly created e-mail for sending. This file can then be viewed by recipients without PRO.FILE access.

- [Inserting a document from PRO.FILE as Link into a new e-mail](#)

If you want to notify a colleague about a file in PRO.FILE, you can insert a link to the PRO.FILE document description into your e-mail. This can help preventing redundancies and duplicate data

### 3.2.1 Saving a new e-mail in PRO.FILE and sending it

The situation:

You want to save a new e-mail, which is to be sent with Outlook, completely (header, body, attachments) to PRO.FILE before sending it.

- ⇒ In case of several attachments, you can select the attachments to be saved.
- ⇒ The e-mail is sent immediately after the saving process.
- ⇒ The body of the e-mail is afterwards no longer displayed in the folder "sent items" – instead the reference to the document ID in PRO.FILE and a corresponding link is displayed.
- ⇒ The recipient of the e-mail receives the body / header of the e-mail and the attachments unchanged and without PRO.FILE connection.

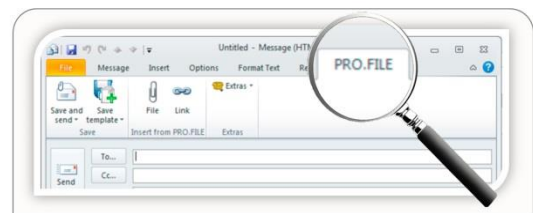


#### Note:

With this function, the e-mail is sent immediately after the saving to PRO.FILE. For this reason, at least one recipient must be specified in the address line. For the saving of e-mails without recipient address, see ["Saving a new e-mail as draft in PRO.FILE"](#).

Proceeding:

1. Create a new e-mail in Outlook with all desired information, attachments and recipients.
2. Select the tab "PRO.FILE" from the Outlook menu bar.



3. Select the function button <Save and send – Create new>. (Optional the function <Select document from list> is available as well. See [The function "Select document from list"](#))

- ⇒ The wizard "Save E-Mail with attachments to PRO.FILE" is displayed.

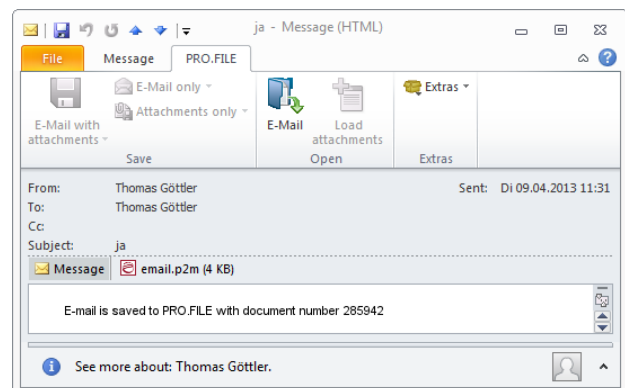


4. Select the attachments you want to save to PRO.FILE by activating the corresponding checkbox ☒. (For detailed information see chapter [Wizard "Save e-mail attachments to PRO.FILE"](#))

**Note:**

All attachments that are not selected in the wizard are not saved to PRO.FILE.

- ⇒ The PRO.FILE Check-In wizard is displayed.
- 5. Enter the data for the document description of the e-mail message to be saved.  
(For detailed information see the manual "PRO.FILE advanced - Creating, managing and changing PRO.FILE objects").
- 6. Confirm with <Finish>.
- ⇒ The Check-In wizard is now displayed consecutively for each selected attachment.  
The name of the attachment currently handled by the Check-In wizard is displayed in the title bar of the wizard.
- 7. Fill in the document description for each selected e-mail attachment.
- 8. Confirm with <Finish>.
- ⇒ The document descriptions created for the saved attachments are automatically linked in PRO.FILE to the document description of the e-mail.
- ⇒ The saving process is thus finished.
- ⇒ The body of the e-mail in your inbox is now replaced by a reference to the corresponding document in PRO.FILE.  
Access to the document description is also possible via a double-click on the link **email.p2m (4 KB)**.



### 3.2.2

#### Saving a new e-mail as draft in PRO.FILE

The situation:

An e-mail just created in Outlook is not to be sent immediately, but to be saved as a draft in PRO.FILE.

- ⇒ The e-mail is not sent after saving, but can be used as template for future e-mails.
- ⇒ The body of the e-mail saved in PRO.FILE is afterwards no longer directly displayed in the Outlook folder "drafts" – instead a reference to the document ID in PRO.FILE and a corresponding link is displayed.

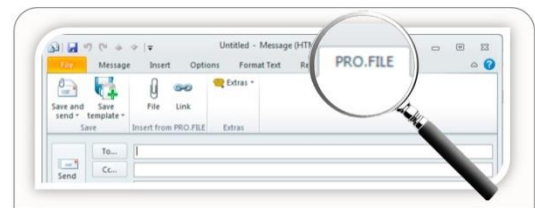
- ⇒ If the e-mail has several attachments, the attachments to be saved to PRO.FILE can be selected. The attachments saved in PRO.FILE are also replaced by a link during the saving process.

**Note:**

When the e-mail is sent at a later point in time, the body / header of the e-mail and the attachments are replaced to the recipient without changes and without PRO.FILE reference.

**Proceeding:**

1. Create the new e-mail in Outlook with all desired information, attachments and addresses.
2. Select the tab "PRO.FILE" from the Outlook menu bar.



3. Click on the function button <Save template – Create new>. (Optional the function <Select document from list> is available as well, please see: [The function "Select document from list"](#))
4. The wizard "Save e-mail with attachments to PRO.FILE" is displayed.
5. Select the attachments you want to save to PRO.FILE by activating the corresponding checkbox ☒. (For detailed information see chapter [Wizard "Save e-mail attachments to PRO.FILE"](#))

**Note:**

All attachments that are not selected in the wizard are not saved to PRO.FILE.

- ⇒ The PRO.FILE Check-In wizard is displayed.
6. Enter the data for the document description of the e-mail message to be saved. (For detailed information see the manual "PRO.FILE advanced - Creating, managing and changing PRO.FILE objects").
  7. Confirm with <Finish>.
- ⇒ The Check-In wizard is now displayed consecutively for each selected attachment. The name of the attachment currently handled by the Check-In wizard is displayed in the title bar of the wizard.
8. Fill in the document description for each selected e-mail attachment.
  9. Confirm with <Finish>.

- ⇒ The document descriptions created for the saved attachments are automatically linked in PRO.FILE to the document description of the e-mail.
- ⇒ The saving process is thus finished.

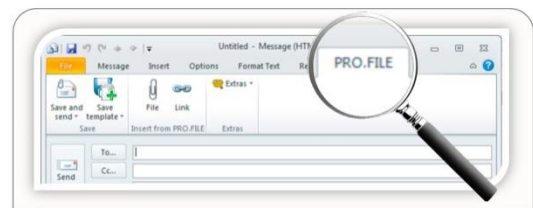
### 3.2.3 Inserting a file from PRO.FILE as attachment into a new e-mail

The situation:

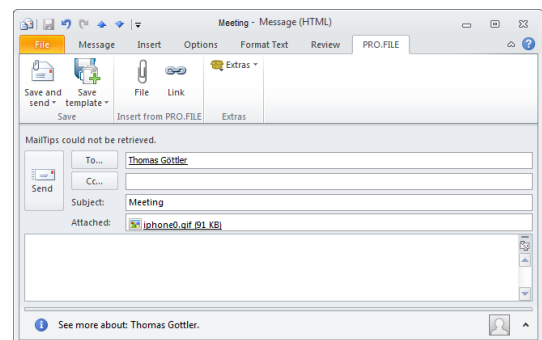
A file from PRO.FILE is to be inserted as attachment into a new e-mail in Outlook.

Proceeding:

1. Create the new e-mail in Outlook.
2. Select the tab "PRO.FILE" from the Outlook menu bar.



3. Click on the function button <File>.
- ⇒ The PRO.FILE Checkout wizard is displayed.
4. Choose the desired document via the search function of the Checkout wizard and select it in the list. (For detailed information see chapter [The PRO.FILE Checkout wizard](#)).
5. Confirm with <open>
- ⇒ The line "Attachments" now shows the selected file as attachment.
- ⇒ The process is thus finished.



### 3.2.4 Inserting a document from PRO.FILE as Link into a new e-mail

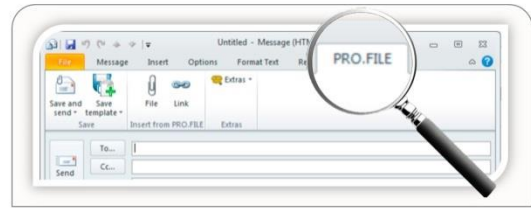
The situation:

You want to link a document description to a new e-mail.



## Proceeding:

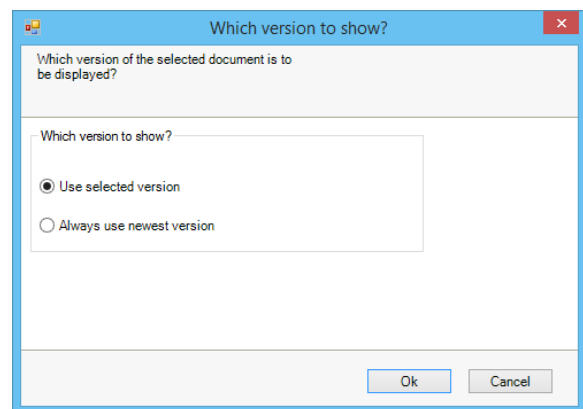
1. Create the new e-mail in Outlook.
2. Select the tab "PRO.FILE" from the Outlook menu bar.



3. Click on the function button <Link>.
4. Choose the desired document via the search function of the Checkout wizard and select it the list. (For detailed information see chapter [The PRO.FILE Checkout wizard](#)).



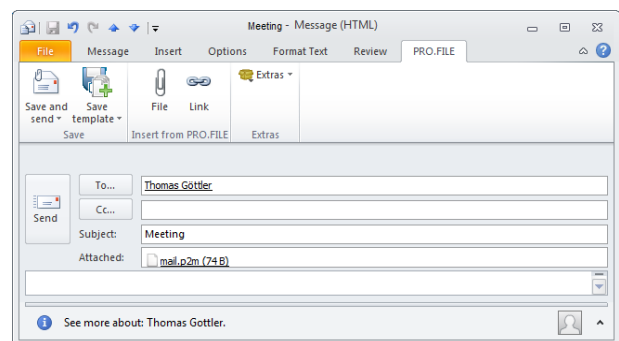
5. Confirm with <open>.
6. Select which version of the document description should be displayed by clicking the link. (See chapter ["Selection Which version to show"](#))



- **Use selected version:**  
The version you have selected in the version chain is displayed.

- **Always use newest version:**  
Using the link, always the newest document description is displayed.

7. Confirm with <OK>.
- ⇒ The line "Attachments" of the e-mail now shows the link to the selected PRO.FILE document description. Double click the link to open the document description.
- ⇒ The process is thus finished.



### 3.2.5 Accessing e-mails saved in PRO.FILE

You have various possibilities if you want to access content and data saved in PRO.FILE:

- [Opening an e-mail from PRO.FILE](#)  
This function opens the version of the e-mail saved to PRO.FILE.
- [Creating an new e-mail from draft in PRO.FILE](#)  
This function creates a new e-mail in MS Outlook from an e-mail saved as draft in PRO.FILE.
- [Displaying a document description of an e-mail attachment saved in PRO.FILE](#)  
This function shows the document description of the selected e-mail.

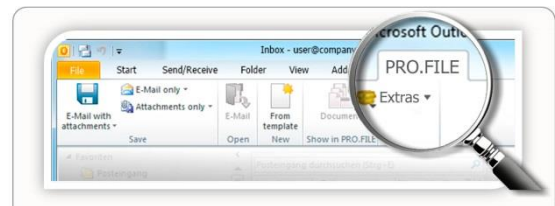
### 3.2.6 Opening an e-mail from PRO.FILE

The situation:

You want to display an e-mail saved to PRO.FILE.

Proceeding:

1. Select the e-mail in Outlook.
2. Select the tab "PRO.FILE" from the Outlook menu bar.



3. Click on the function button <E-Mail>.  
⇒ The saved e-mail including its attachments is opened from PRO.FILE and displayed.  
⇒ The process is thus finished.



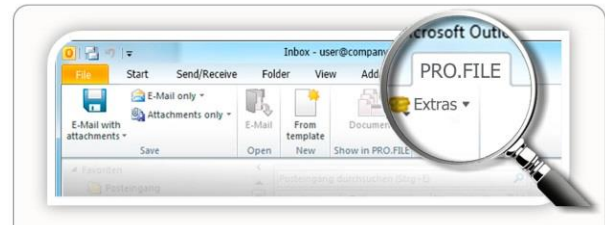
### 3.2.7 Creating an new e-mail from draft in PRO.FILE

The situation:

An e-mail already saved to PRO.FILE should be used as a template for a new e-mail in Outlook.

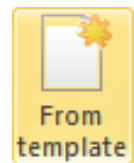
Proceeding:

1. Select the tab "PRO.FILE" from the Outlook menu bar.



2. Click on the function button <From template>.

⇒ The PRO.FILE Checkout wizard is displayed.



3. Choose the desired document via the search function of the Checkout wizard and select it the list. (For detailed information see chapter [The PRO.FILE Checkout wizard](#))
4. Enter the data for the document description of the e-mail message to be opened.
5. Confirm with <Open>



#### Note:

The selected template has to be an MSG file.

- ⇒ The selected e-mail is displayed and can be changed and sent afterwards.
- ⇒ There is also the option to save the created e-mail to PRO.FILE as shown in chapter ["Saving a new e-mail in PRO.FILE and sending it"](#).
- ⇒ The process is thus finished.

### 3.2.8 Displaying a document description of an e-mail attachment saved in PRO.FILE

The situation:

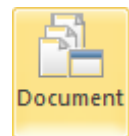
You want to show a document description of an e-mail attachment already saved to PRO.FILE.

Proceeding:

1. Select the e-mail in Outlook.
2. Select the tab "PRO.FILE" from the Outlook menu bar.



3. Click on the function button <Document>.
- ⇒ The document description is displayed.
- ⇒ The process is thus finished.



## 3.3 Using documents from PRO.FILE in the calendar and task management of Outlook

You can save content and data from PRO.FILE as additional information to a task and appointment. You can either insert the file directly or link to the document description.

- [Inserting a file from PRO.FILE into a task as attachment](#)  
This function inserts a file from PRO.FILE into a task as an attachment.
- [Linking a document description from PRO.FILE to a task](#)  
This function inserts a P2M link into a PRO.FILE document description into a task.
- [Inserting a file from PRO.FILE to an appointment as attachment](#)  
This function inserts a file from PRO.FILE into an appointment as attachment.
- [Linking a document description from PRO.FILE to an appointment](#)  
This function inserts a P2M link into a PRO.FILE document description into the appointment.

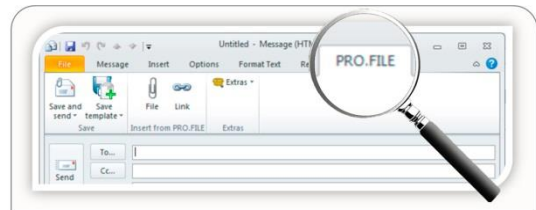
### 3.3.1 Inserting a file from PRO.FILE into a task as attachment

The situation:

You want to insert a file already saved to PRO.FILE into a task.

Proceeding:

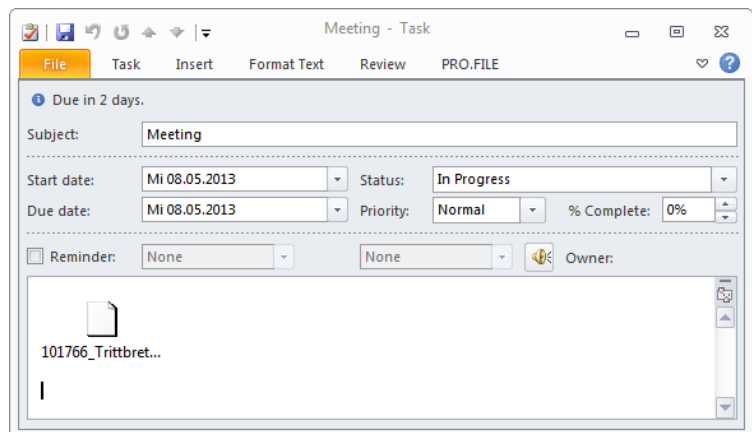
1. Create a new task in Outlook with the desired information.
2. Select the tab "PRO.FILE" from the Outlook menu bar.



3. Click on the function button <File>.
- ⇒ The Checkout wizard is displayed.
4. Choose the desired document via the search function of the Checkout wizard and select it in the list. (For detailed information see chapter ["The PRO.FILE Checkout wizard"](#))
5. Confirm with <open>.



- ⇒ The file is now inserted into the body of the task as an attachment. Double click the link to open the attachment.
- ⇒ The process is thus finished.



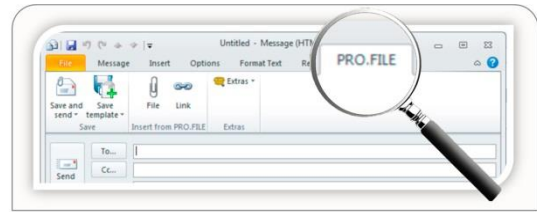
### 3.3.2 Linking a document description from PRO.FILE to a task

The situation:

You want to link a document description to a task.

Proceeding:

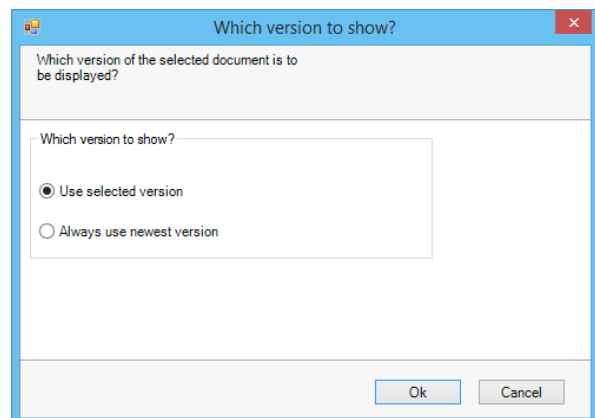
1. Create a new task in Microsoft Outlook with the desired information.
2. Select the tab "PRO.FILE" from the Outlook menu bar.



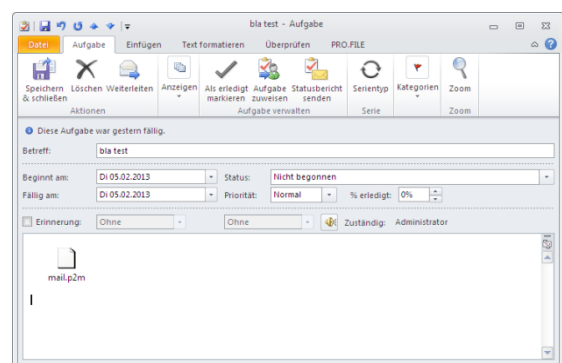
3. Click on the function button <Link>.
- ⇒ The PRO.FILE check out wizard is displayed.
4. Choose the desired PRO.FILE document via the search function of the Checkout wizard and select it in the list. (For detailed information see chapter "[The PRO.FILE Checkout wizard](#)")
5. Enter the characteristics of the document description to be linked.
6. Confirm with <open>.



7. Select which version of the document description should be displayed. (See [Selection "Which version to show"](#))



8. Confirm with <Ok>
- ⇒ A link to the document description is now inserted into the body of the task.
- Double click the link to open the document description.
- ⇒ The process is thus finished.



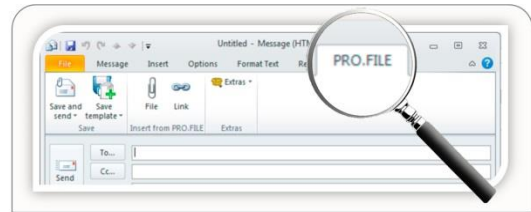
### 3.3.3 Inserting a file from PRO.FILE to an appointment as attachment

The situation:

You want to insert a file already saved to PRO.FILE into an attachment as attachment.

Proceeding:

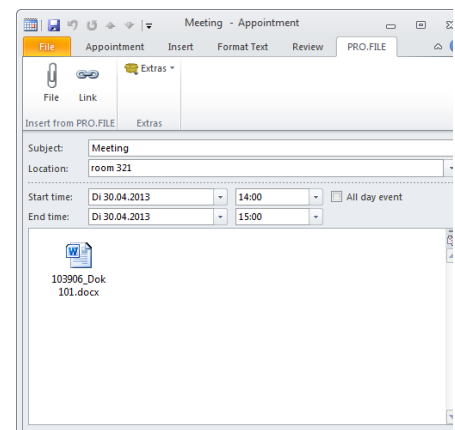
1. Create a new appointment in Microsoft Outlook with the desired information and participants.
2. Select the tab "PRO.FILE" from the Outlook menu bar.



3. Click on the function button <File>.
- ⇒ The PRO.FILE check out wizard is displayed.
4. Choose the desired PRO.FILE document via the search function of the Checkout wizard and select it in the list. (For detailed information see chapter [The PRO.FILE Checkout wizard](#))
5. Enter the characteristics of the document description to be linked.
6. Confirm with <open>.



- ⇒ The file is now inserted into the body of the appointment as an attachment. Double click the link to open the attachment.
- ⇒ The process is thus finished.



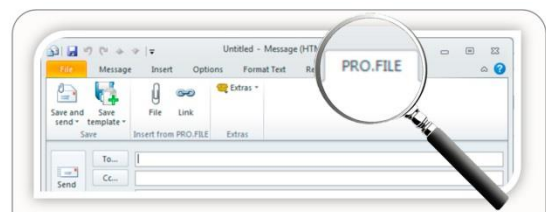
### 3.3.4 Linking a document description from PRO.FILE to an appointment

The situation:

You want to link a document description to an appointment.

Proceeding:

1. Create a new appointment in Microsoft Outlook with the desired information and participants.
2. Select the tab "PRO.FILE" from the Outlook menu bar.



3. Click on the function button <Link>.

⇒ The PRO.FILE check out wizard is displayed.

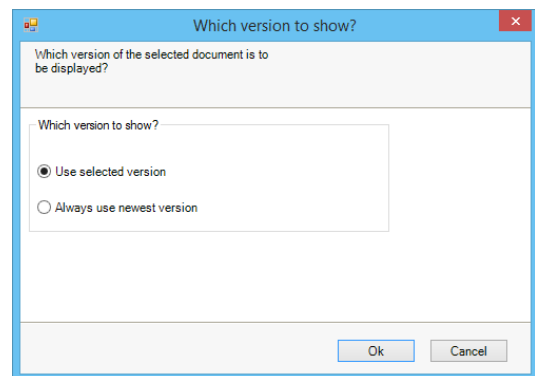
4. Choose the desired PRO.FILE document via the search function of the Check-out wizard. (For detailed information see chapter [The PRO.FILE Checkout wizard](#))

5. Enter the characteristics of the document description to be linked.

6. Confirm with <open>.

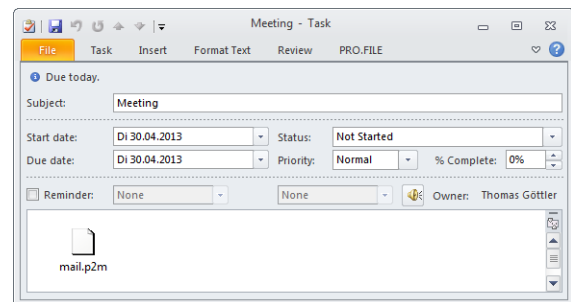
7. Select which version you want to see when you click the link  
[Selection "Which version to show"](#).

8. Confirm with <Ok>



⇒ A link to the document description is now inserted into the body of the appointment.  
Double click the link to open the document description.

⇒ The process is thus finished





## 4                      Function overview of the integration PRO.FILE – Outlook VSTO

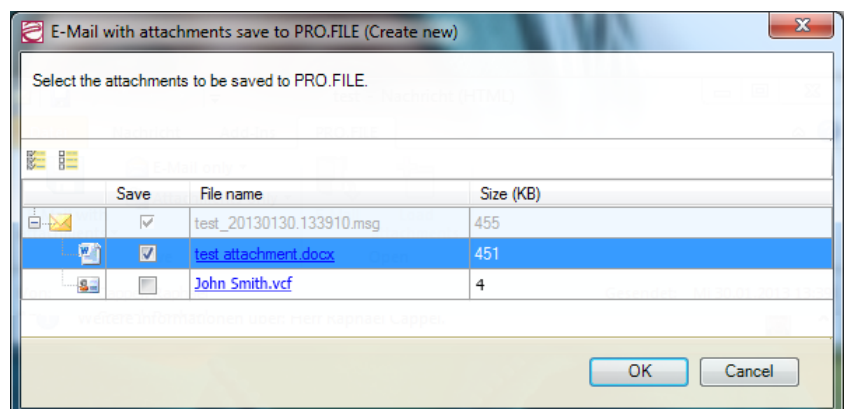
This chapter describes in detail the different functions and wizards that are used in the integration PRO.FILE – Outlook VSTO:

- [Wizard "Save e-mail attachments to PRO.FILE"](#)
- [Selection "Which version to show"](#)
- [The PRO.FILE Checkout wizard](#)

### 4.1                      Wizard "Save e-mail attachments to PRO.FILE"

Whenever you want to save new attachments in an e-mail to PRO.FILE, the wizard for the saving of attachments to PRO.FILE is displayed. Via the wizard you can select the attachments you want to save to PRO.FILE.

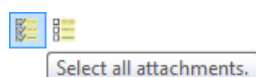
1. Select the attachments you want to save to PRO.FILE by activating the corresponding checkbox ☒.
2. Confirm with <OK>.



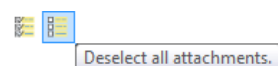
All selected attachments are saved to PRO.FILE and replaced in the e-mail by a link  **email.p2m (4 KB)**.

All attachments that are not selected in the wizard are not saved to PRO.FILE and thus remain as attachments with the e-mail.

#### Buttons for multiple selection






All attachments in the list are selected and the checkmark for saving is activated: ☒




The selection of every already selected attachment is removed and the checkmark for saving is de-activated: ☐

### Information in the list

In the selection list of attachments to be saved...

	Save	File name	Size (KB)
	<input checked="" type="checkbox"/>	test_20130130.133910.msg	455
	<input checked="" type="checkbox"/>	test_attachment.docx	451
	<input type="checkbox"/>	John Smith.vcf	4

- The first column indicates the system icon for the file type, the second column the selection for saving in PRO.FILE, the third column the file name of the attachment, the fourth column the file size in kilobyte.
  - The first row shows whether e-mail is to be saved or only the attachments.
    - If the checkbox in this line is activated, the e-mail is also saved to PRO.FILE and linked to the document descriptions of the attachments. (Function button **<E-Mail with attachments>**)
    - If the checkbox is not activated, only the attachments are saved to PRO.FILE and replaced in the e-mail by a link  **email.p2m (4 KB)**. (Function button **<Attachments only>**)
- ⇒ The setting of this checkmark is made by the previous selection of the saving function and cannot be changed in this wizard screen.
- The corresponding file can be opened and displayed directly via the link created for the file names of the attachments.  
(Note: using this process the file can only be viewed but not opened.)

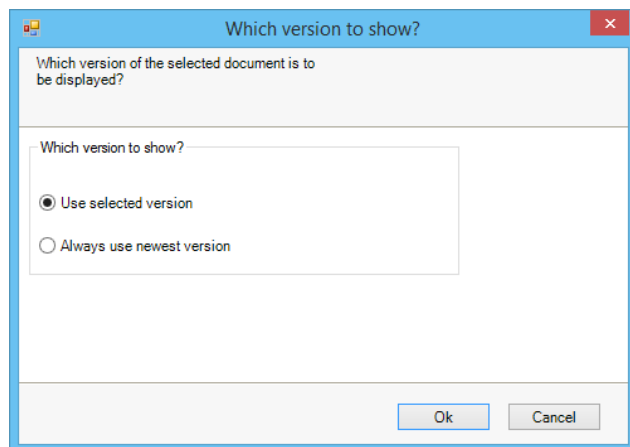
## 4.2

### Selection "Which version to show"

If you want to link documents to a new e-mail, you can use the function "Link". (See chapter ["Inserting a document from PRO.FILE as Link into a new e-mail"](#))

Using this function, a link to a document in PRO.FILE is created. There are two options which are called up by the selection screen "Which version to show":

- **Use selected version:**  
by using the link in the e-mail always the selected version is displayed, even if there are more current versions.
- **Always use newest version:**  
By using the link in the e-mail, always the newest version is displayed.



1. Select which version you want to see when you click the link [Selection "Which version to show"](#).
2. Confirm with **<Ok>**.

⇒ The link to the selected document is now inserted in into the e-mail.

## 4.3 The function "Select document from list"

### The situation:

This option is used in the saving process of incoming e-mails and/or attachments if no document description is to be created, but an already existing document description is to be overwritten or versioned. (For detailed information concerning versioning see the manual "PRO.FILE advanced – creating, managing and changing PRO.FILE documents").

### Proceeding:

The approach after calling the function "Select document from list" differs in one decisive point:

- A document description is not created but an already existing one is selected.
- This process is not performed by the PRO.FILE Check-In Wizard but by the Check-Out Wizard.
- If there is already a file saved to the selected document description this file is overwritten or versioned.



### Attention: Undo not possible!

Overwriting a file cannot be undone. The option Overwrite results in the loss of the already existing file.



### Note:

A document description can only have one file saved to it. After all, the document description is to describe just one file and help retrieving it.

1. Click on the function button **<Select document from list>**.
2. Depending on the context, the wizard for selecting the attachments to be saved will be displayed.  
Select the attachments you want to save to PRO.FILE and activate the check box. (For detailed information see chapter "[Wizard "Save e-mail attachments to PRO.FILE"](#)")  
⇒ The PRO.FILE Checkout Wizard is displayed.
3. Choose the desired document via the search function of the Checkout wizard and select it from the list. (For detailed information see chapter "[The PRO.FILE Checkout wizard](#)")
4. Confirm with **<open>**.

⇒ The request "Save document" is displayed.

5. Select if you want to overwrite or version the file.

- **Create version**

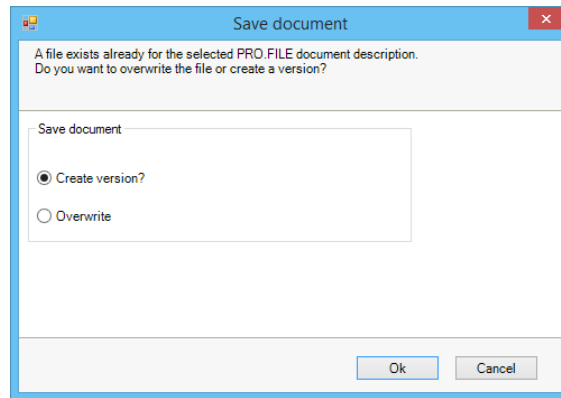
The file you want to save in PRO.FILE will be saved as a new version. The file already saved to the document description will remain as an older version.

- **Overwrite**

The file already saved to the selected document description will be **overwritten** with the new file that is to be saved!

6. Confirm with <OK>

⇒ The process is thus finished.



## 4.4

### The PRO.FILE Checkout wizard

If you run the function "open" via the PRO.FILE integration, you will have to set in the next step which document you want to open. The Checkout wizard helps you do this.

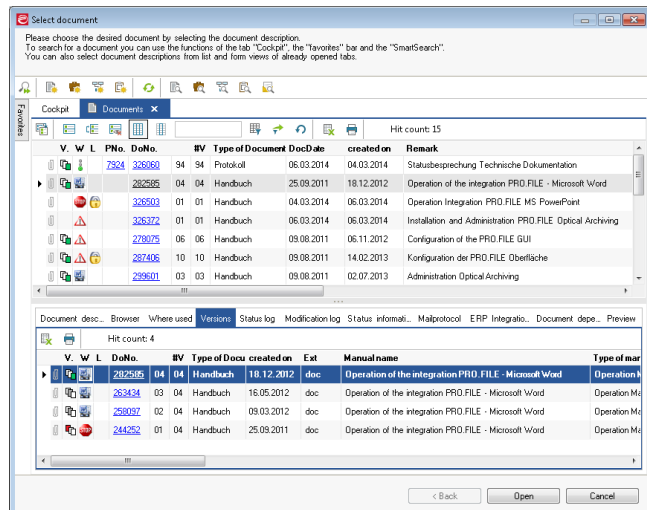
The **aim** of this approach is in principle:

- PRO.FILE only knows which document you want to open if the document description is:
  - Either selected in the list view or in a browser
  - Or is displayed in the form view.
- Click the button <OK> at the lower right screen corner and the document will be opened.

**Prerequisite** for selecting/activating of a document description in PRO.FILE is that this document description is displayed in list or form view.

The PRO.FILE interface is displayed in the status you last run it.

- If tabs have already been opened, you can directly access the data within these tabs.  
Is the desired document listed in the view, click on it and then click the button **<open>**.



- If no tabs are already open or the desired document is not displayed yet, you search for it now.  
To do so, you can use several functions that are explained in the following:



### Beware the double click within the Checkout wizard.

To open documents, select them and click on the button **<open>**. A document **cannot be opened via a double click!**

A double click means: you can only view the document!

The Checkout wizard remains active in the background to receive your selection. You have to close the Checkout wizard before you can continue to work in MS-Word.




### Search for data in the Checkout wizard

To search for data in the Checkout wizard you have several possibilities:

- **The search using the tab "Cockpit"**  
The tab "Cockpit" consists of the same symbols as the icon bar: "Search document", "Full text search", and "Search part". Search project, have the same functionality as the icons of the icon bar. You can go back to the tab "Cockpit" at any time.
- **The search using the functions of the Favorites list**  
In the Favorites list there are as well several possibilities to select a document:
  - You can retrieve your searches or data lists kept in memory via double click using the "favorites".
  - You can create your own search forms using "SmartSearch".
  - If you work with PRO.FILE- processes and –tasks, you can open the linked documents when calling a task category.

- **The Search using the icon bar**

In the superior icon bar searches can be started via the following icons:

-  : Search for documents to display in a list.
-  : Search for parts to display in a list. You can only select documents linked to the part in the dependent tabs "browser" and "document dependence".
-  : Search for projects to display in a list. You can only select documents linked to the project in the dependent tabs "browser" and "document dependence".

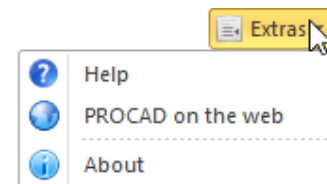
For detailed information concerning the selection of data in PRO.FILE see manual "Operation PRO.FILE for Beginners".

## 4.5

### Extras

The button "Extras" can be found in the tab "PRO.FILE" in the Outlook menu bar. From there you can access the following functions:

- [Help](#):  
For the support of your work with the integration you can open the PRO.FILE online help with this function.
- [PROCAD on the web](#):  
Opens the official web site of the company PROCAD.
- [About](#):  
System information on the installed integration and the used PRO.FILE system.



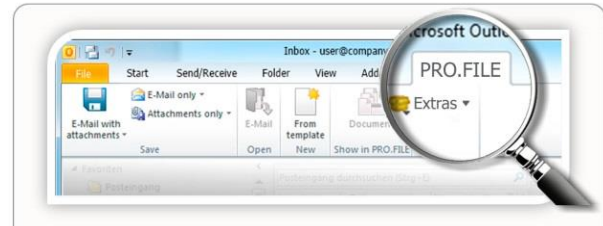
### 4.5.1

#### Help

For the support of your work with the integration PRO.FILE – Outlook VSTO you can open the PRO.FILE online help in the NetHelp format in your web browser.

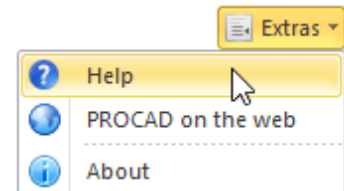
Proceeding:

1. Select the tab "PRO.FILE" from the Outlook menu bar.



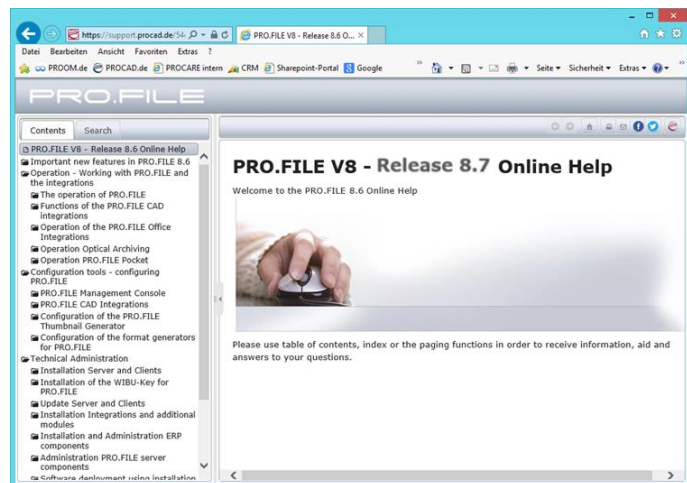
2. Select the function button <Extras> => <Help>.



⇒ The PRO.FILE online help is now displayed in your default web browser.



- On the left-hand side you find a structure overview, where you can select the desired chapters of the help.
- The right-hand side displays the contents of the chapter.

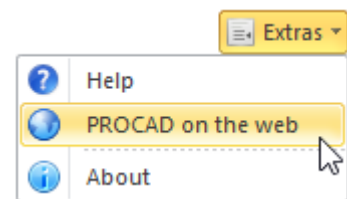
Within the help window you can use the following functions:



- : Switching forward and backward from chapter to chapter.
- Contents: Displays the chapter structure
- Search: Enter a search string. The entire help is then searched for this string. The search hits are displayed in the left-hand window pane.
- : Print the currently displayed help chapter.

### 4.5.2 PROCAD on the web

Via the menu function "PROCAD on web" you can directly access the web site of the company PROCAD for the latest information regarding PRO.FILE.



Function call from the PRO.FILE menu in MS Outlook

Tab "PRO.FILE" => Group "Extras" => "Extras" => "PROCAD on web"

### 4.5.3 About

Via the button "Extras" => "About" you can view the basic system information on the installed integration PRO.FILE – Outlook VSTO. This system information may be of relevance when you are in contact with the PRO.FILE support.

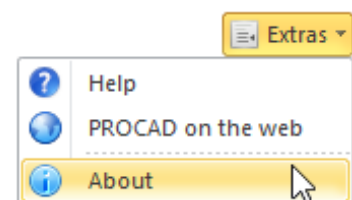
Proceeding:

1. Select the tab "PRO.FILE" from the Outlook menu bar.
2. Select the function button <Extras> => <About>.



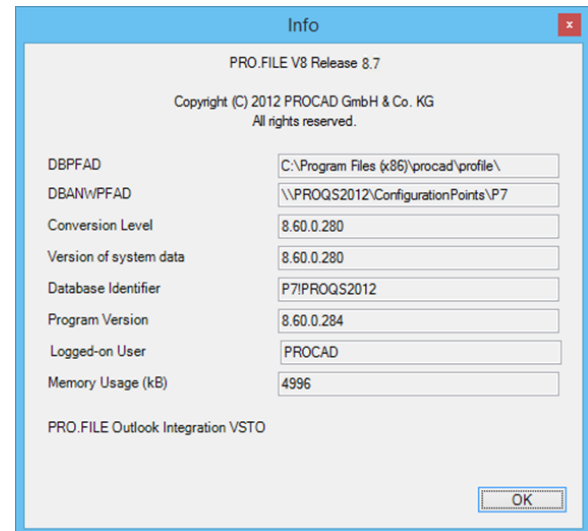
⇒ The then displayed information window shows the following information:

- The installation path of the PRO.FILE Windows Client
- The path to the current PRO.FILE configuration point.
- The conversion status of the installed integration version.





- The AST data version
- The currently used PRO.FILE database.
- The version number of the installed PRO.FILE client.
- The currently logged-in user.
- The current memory usage in kb of the integration PRO.FILE – Outlook VSTO.



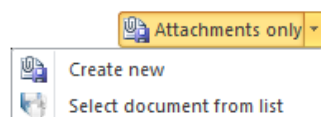
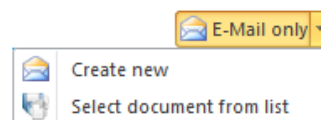
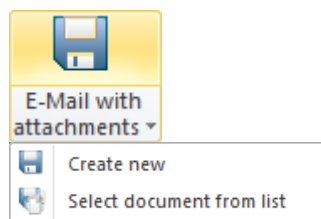
## 5 Overview of menus and buttons

In this chapter you will find a compilation of the menu items and buttons of the Integration PRO.FILE – Outlook VSTO:

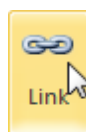
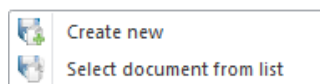
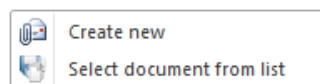
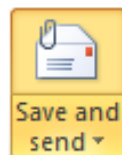
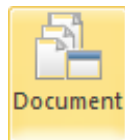
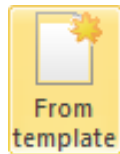
- [Buttons in the menu of the integration](#)
- [Functions in the context menu of Outlook](#)

### 5.1 Buttons in the menu of the integration

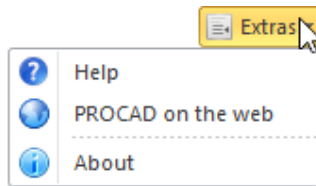
The following compilation gives an overview which buttons are available in which PRO.FILE menu in MS Outlook:



- **E-Mail with attachments:**  
This function saves the e-mail and their attachments in PRO.FILE.  
See [Saving incoming e-mails with attachments](#)
- **Create new:**  
Here the same function as with "E-Mail with attachments" is run.
- **Select document from list:**  
With this function you can overwrite or version an existing document description in PRO.FILE.
- **E-Mail only:**  
This function saves the email in PRO.FILE, but not the attachments.
- **Create new:**  
Here the same function as with "Only E-Mail" is run.
- **Select document from list:**  
With this function you can overwrite or version an existing document description in PRO.FILE.
- **Attachments only:**  
This function saves only the attachment of the e-mail, not the mail itself.
- **Create new:**  
Here the same function as "only attachments" is run.
- **Select document from list:**  
With this function you can overwrite or version an existing document description in PRO.FILE.



- **Email:**  
This function opens the version of the e-mail saved in PRO.FILE.  
See [Opening an e-mail from PRO.FILE](#)
- **From template:**  
This function creates a new e-mail in MS Outlook from a saved e-mail as template.  
See [Creating an new e-mail from draft in PRO.FILE](#)
- **Document:**  
This function shows the document description for the selected e-mail.  
See [Displaying a document description of an e-mail attachment saved in PRO.FILE](#)
- **Save and send:**  
You want to save a newly created e-mail with the desired attachment in PRO.FILE and send it to the indicated addressee immediately thereafter.  
See [Saving a new e-mail in PRO.FILE and sending it](#)
- **Create new:**  
Here the same function as with "save and send" is run.
- **Select document from list:**  
With this function you can overwrite or version an existing document description in PRO.FILE.
- **Save template:**  
This function saves the e-mail as template in PRO.FILE.  
See [Saving a new e-mail as draft in PRO.FILE](#)
- **Create new:**  
Here the same function as with "save template" is run.
- **Select document from list:**  
With this function you can overwrite or version an existing document description in PRO.FILE.
- **File:**  
This function inserts a saved file as attachment into an e-mail or task.  
See [Inserting a file from PRO.FILE as attachment into a new e-mail](#)
- **Link:**  
This function inserts a P2M link to a PRO.FILE document description into an e-mail or task.  
See [Inserting a document from PRO.FILE as Link into a new e-mail](#)



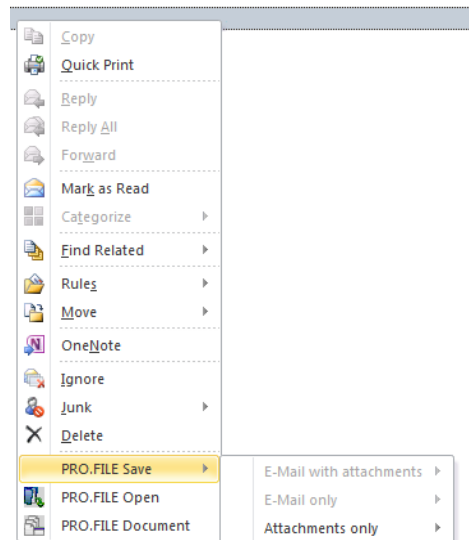
- **Extras => Help:**  
This function calls up the PRO.FILE Online help  
See [Help](#)
- **Extras => PROCAD on the web:**  
Opens the official web site of the company PROCAD  
See [PROCAD on the web](#)
- **Extras => About:**  
This functions shows an overview of versions and configuration settings of the used integration PRO.FILE – Outlook VSTO.  
See [About](#)

## 5.2 Functions in the context menu of Outlook

If you have selected an e-mail in a folder of Outlook, you can access various PRO.FILE functions via the context menu of the right mouse button.

You will find there:

- **PRO.FILE Save:**  
You have the following options:
  - **E-Mail with attachments:**  
This function creates an own document description for each the e-mail and its attachments.  
(See [Saving incoming e-mails with attachments](#))
  - **E-Mail only:**  
This function creates a document description in PRO.FILE for the e-mail, but not for its attachments. (See [Saving incoming e-mails without attachments](#))
  - **Attachments only:**  
This function creates a document description for the attachment, but not for the e-mail itself.  
(See [Saving only the attachments of an incoming e-mail](#))
- **PRO.FILE Open:**  
The last version of the e-mail saved in PRO.FILE will be opened. (See [Opening an e-mail from PRO.FILE](#))
- **PRO.FILE Document:**  
The document description of the selected e-mail is displayed. (See [Creating an new e-mail from draft in PRO.FILE](#))



The respective applications and approaches are describes in the linked chapters of this manual.

## 6

## Index

<b>A</b>		
about .....	33	
Accessing e-mails saved in PRO.FILE.....	19	
<b>C</b>		
calendar .....	21	
<b>E</b>		
e-mail		
template .....	20	
Extras .....	31	
<b>F</b>		
function overview .....	26	
<b>H</b>		
help .....	31	
<b>I</b>		
insert		
attachment from PRO.FILE .....	22, 24	
file from PRO.FILE.....	17	
link to PRO.FILE document .....	17, 23, 24	
integration Outlook VSTO		
buttons .....	35	
<b>M</b>		
menus		
overview .....	37	
menus overview .....	35	
<b>O</b>		
open		
Checkout wizard.....	29	
e-mail from PRO.FILE.....	19	
outgoing e-mails .....	12	
overwrite .....	28	
<b>P</b>		
PROCAD on the web .....	33	
<b>S</b>		
save		
e-mail as draft .....	15	
e-mails without attachments.....	10	
incoming e-mails.....	8	
Save		
attachments only .....	11	
e-mails with attachments .....	9	
Save and send .....	14	
save draft .....	15	
save e-mail attachments to PRO.FILE .....	26	
Select document from list.....	28	
show		
attachment in PRO.FILE.....	21	
starting the integration .....	7	
<b>T</b>		
table of contents.....	3	
task management.....	21	
template from PRO.FILE .....	20	
The Integration PRO.FILE – Outlook VSTO .....	6	
<b>U</b>		
usage cases .....	8	
<b>V</b>		
version .....	28	
versions.....	27, 28	
<b>W</b>		
Which version to show?.....	27	