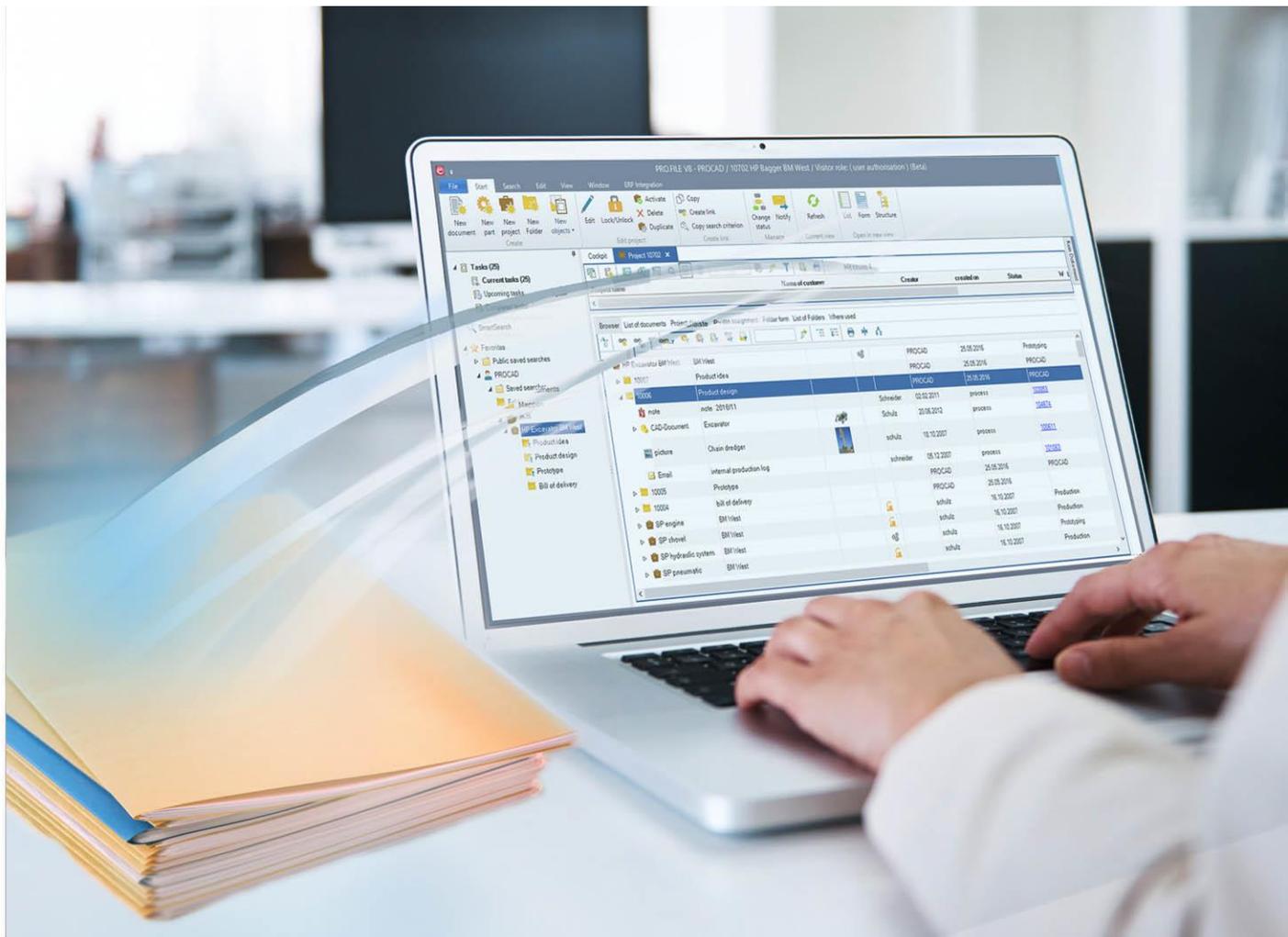


Operation PRO.FILE WebClient

PRO.FILE Release 8.7
July 2017



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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 First things first: Basic remarks and requirements

You can use the PRO.FILE Web client anywhere you have access to Internet Explorer and an Internet connection. It is opened in the same way as a normal web page. No installation is required on the computer used to access the Web client.

However, we recommend you take note of the following information and requirements for working with the Web client:

- Internet browser requirements:

The only program you need to work with PRO.FILE Web Client on the client side is Microsoft Internet Explorer with JavaScript.



Attention:

Internet Explorer 9, 10 and 11 are supported. Make sure that the JavaScript components are activated!

- Limitation of additional functions

Some functions of browser add-ons (e.g. display of multiple windows in a single browser) are not supported.

Internet Explorer 7 allows multi-tab browsing to display several web pages in different tabs. It is not possible to run several instances of the PRO.FILE Web Client in several tabs. The PRO.FILE Web Client does **not** support this type of multi-tab usage.

- No setup procedure is required to use the Web client.

(Note: The PRO.FILE Web Server setup program included on the installation DVD is only provided for administrators and is used to install the Web Server.

- The PRO.FILE Web client continues running until Internet Explorer is closed!

A mechanism known as "Heartbeat" has been developed for the PRO.FILE V8 Web client. This keeps a PRO.FILE session active even if there is no input from the user for a long period of time.

This means that a PRO.FILE user can take an hour out for lunch, for example, and then simply continue with their work in the PRO.FILE Web client when they return. This is not always the case on the Web, since other applications often log users out after a certain period has elapsed.

However, the other consequence of this mechanism is that PRO.FILE continues running until Internet Explorer is actually closed!

- Work step-by-step, rather than using multiple commands simultaneously

When you work with the PRO.FILE Web client, it has to make contact with the Web server. The speed at which this happens is heavily dependent on the Internet connection you are using.

When working with the PRO.FILE Web client, it is important to always wait until a command has been fully executed. If the user fails to do this and instead activates further commands, the PRO.FILE Web client can no longer cleanly process these tasks and will not behave as desired.

- Remember that it is a Web client!

The PRO.FILE Web client is not suitable for making complex changes or selections or editing structures containing several hundred objects or more. It is preferable to use the PRO.FILE Windows client for these kinds of activities.

2 Working with the Web Client

Operating the Web client is broadly equivalent to operating the Windows client. You can therefore also find information and tips on working with the Web client in the standard manuals "Operation PRO.FILE for Beginners" and "Operation PRO.FILE Advanced".

However, there are a few special features due to the integration in Internet Explorer and the data connection over the Internet. These are described in the following sections.

2.1 Differences between the Web Client and the Windows Client?

If you look at the user interface of the PRO.FILE Web client, you will hardly spot any differences to the familiar PRO.FILE Windows client. The layout and functions have been kept as close as possible to the Windows user interface.

However, there are various differences due to the browser-based nature of the Web client:

- **Right button context menu only for homepage and overview bar**

For performance reasons, the context menu called up by clicking the right mouse button is only available on the homepage and in the left-hand overview bar. In the tab views, the associated commands and functions are available via the "Edit" menu.

- **PRO.FILE standalone**

Interaction with PRO.FILE integrations is not possible with the Web client. The PRO.FILE Windows client must be used for this purpose.

- **Saving files in PRO.FILE**

In the PRO.FILE Windows client, drag-and-drop can be used to save any required files in PRO.FILE. This procedure is not available in the Web client. Instead of drag-and-drop, the Web client requires the "Upload" button to be used, as described in the chapter "[Save files via the Web client](#)".

Functional scope

The functional scope of the Web client is slightly limited compared to the Windows client. The following features are not available in the Web Client:

- **Categories**

Categories can only be used in the PRO.FILE Windows Client.

- **Folders**

Folders can be used in the Web Client but there are some limitations:

- There are no structure editors.
- The function "Duplicate folder" is not available.
- The folder structure cannot be assigned when a new project is created.
- There is no fast check-in.

- Drag & drop functions are not available
- Date picker
The picker for the selection of dates is only available in the Windows client.
- Filters in list functions and for the selection of users can only be used in the Windows client.

All the other functions familiar from the PRO.FILE Windows client are available as normal.

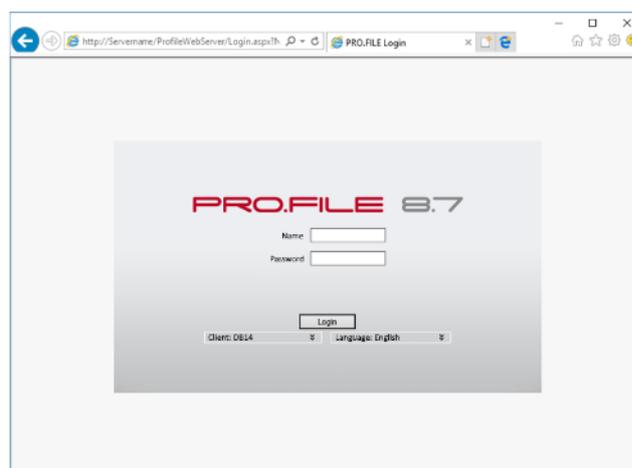
You will therefore also find detailed information on operating the client in the standard manuals "Operation PRO.FILE for Beginners" and "Operation PRO.FILE Advanced".

This document only describes the special aspects of the Web client.

2.2 Start the Web Client

Opening the PRO.FILE Web client is a simple procedure:

1. Open Internet Explorer
2. Enter the address of your Web client
This address can be obtained from your system administrator. It has the syntax:
`http://servername/ProfileWebServer`
The important factor is the name of the server, the Web client is to access.
3. After the confirmation of your input with the <Return> key, the login page of the Web client is displayed:



4. You can now log in to PRO.FILE as normal. Log in using the username and password that you use for the PRO.FILE Windows client.

**Note:**

If the information you enter is rejected by PRO.FILE, try entering it in the fields again. If you are still unable to log in to PRO.FILE, this could mean that your system administrator has not yet created a PRO.FILE user name or password for you. Should this be the case, please contact your system administrator.

Client and language selection

If this feature is used in your PRO.FILE installation, you can choose from different clients and languages on the login page. This selection has to be made before logging in.

Information on the setting up of clients can be found in the manual "Administration PRO.FILE".

2.3**Save files via the Web client**

To and save files in PRO.FILE when using the Web client, simply use the Upload button .

**Note:**

It is not possible to use the drag-and-drop method familiar from the PRO.FILE Windows client to save files when using the Web client.

Proceed as follows

1. Create a new document description.

To save a file to PRO.FILE using the Web client, a document description must have already been created, to which the file to be uploaded can be assigned. To do this, select "File" => "New" => "Document", in the same way as in the PRO.FILE Windows client. An input window will appear, which you can use to create the document description.

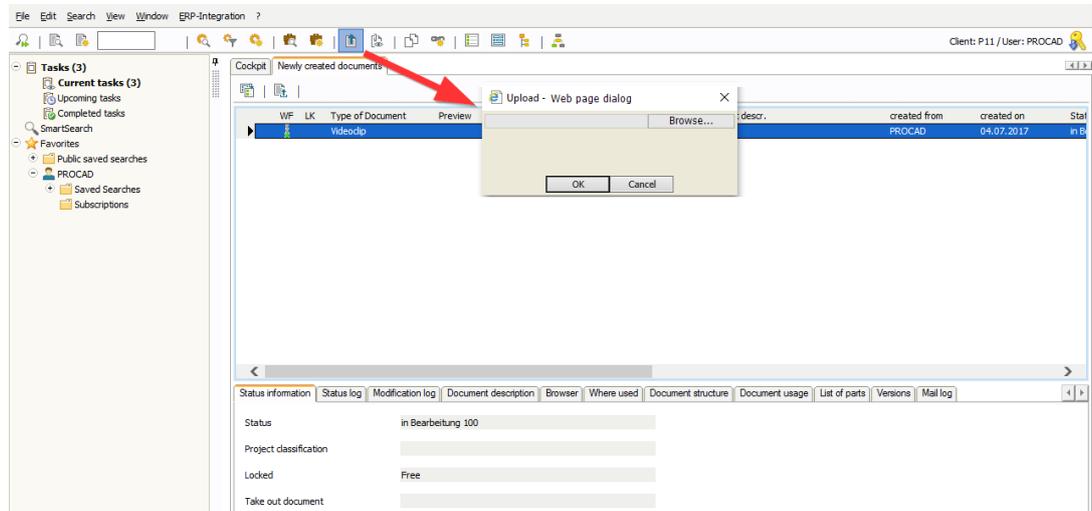
2. Select the desired document description.

The document description, under which a file is to be saved, must now be selected. If you created a new document description in Step 1, this will automatically be activated. If not, the desired document description must be selected using the selection functions.

3. Click the Upload button.

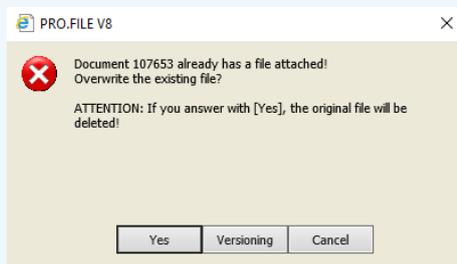
To save a file to the selected document description, click the Upload button. The Upload button is located on the Web client's toolbar.

⇒ An input window appears, which you can use to select the file to be saved:



Attention:

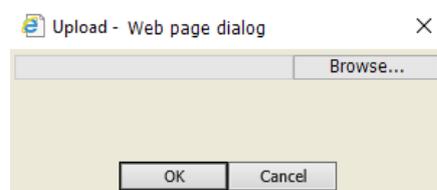
If a file has already been attached to the selected document description, a warning message will appear:



If you click <OK> in this dialog box, the existing file will be overwritten and therefore permanently deleted! You can save the file as a new version and thus keep the old version. If you do not wish to overwrite the existing file, please click <Cancel>.

4. Select the file to be saved.

Using the input window that appears and the <Browse> button, you can now use the Windows Explorer functions to select the file you wish to save. Only one file can be selected, since only one file can be assigned to each document description in PRO.FILE.



5. Accept the selected file by clicking <Next> in PRO.FILE.

Once the file you wish to save has been selected and its full path has been entered in the input window, you can upload and save this file in PRO.FILE. To do this, click <Next>. Please ensure you have entered the file name and path correctly. If they are entered incorrectly, no file will be found and no upload will take place.

- ⇒ The file upload is now complete.
- ⇒ The selected data has been saved to the selected document description in PRO.FILE. If the selected document description is active in the list view, the paper clip symbol  in the left-hand column of the list indicates that a file has been assigned to the selected document description.

2.4 Terminate the Web client session

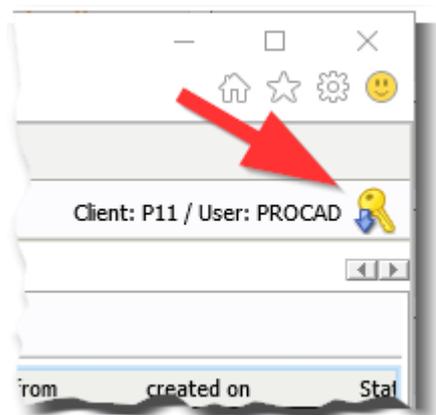
Once a PRO.FILE WebClient session is open, it will continue running until Internet Explorer is closed. The PRO.FILE V8 Web client utilises a specially developed mechanism known as "Heartbeat", which keeps a PRO.FILE session active even if there is no input from the user for a long period of time.

However, this also means that access to PRO.FILE continues to be operative until Internet Explorer is closed!

In order to terminate the Web client session, you must therefore log out. This immediately terminates the connection to the Web server. The corresponding resources on the Web server are then released.

Proceed as follows

1. Click on the  icon in the top right-hand corner of the Web client screen.



- This logs out the current user and closes the connection to PRO.FILE. Internet Explorer will now revert to the login screen for the Web client.
- ⇒ You have successfully logged out.

3

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