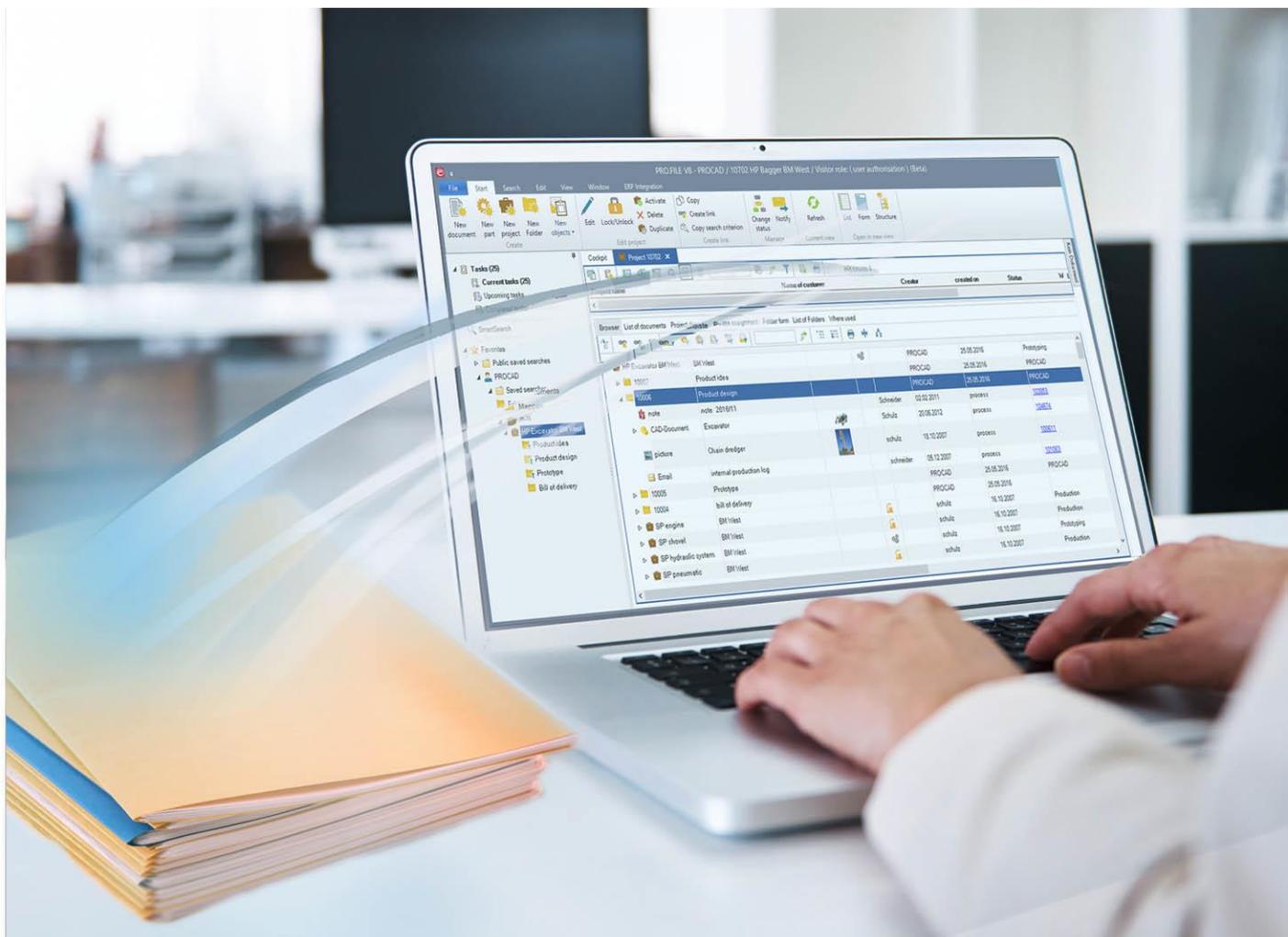


# Operation PRO.FILE Mail Connector Outlook

PRO.FILE Release 8.7  
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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 The operation of the PRO.FILE Mail Connector for MS Outlook

The following chapters contain descriptions of the basic information required for the operation of the Mail Connector.

## 1.1 Functions and Requirements

The PRO.FILE - Mail Connector for MS Outlook allows a systemization of the information process within the workflow. This way it can be ensured that messages do not get lost, that messages are available in their entirety and that no receiver is forgotten.

In addition, it is possible to inform employees who are not connected to the workflow at a particular point.

Objects are not sent as copies but as references. This ensures that the current version can be accessed at all times. The configuration manual explains how to determine recipients who will be notified by e-mail whenever a certain status change occurs. In the corresponding entry form a standardized message text can also be configured.



### Note:

Prerequisite for a participating user's access to the Mail Connector functions is the setup of an e-mail address in the user data within the PRO.FILE management console. Within this user data area, the field "**E-Mail Address**" should be filled out with the corresponding e-mail address, otherwise it will not be possible to have automatic sending of information within the workflow, and it will also be impossible to manually enter recipients which are to be informed on an ad hoc basis. Further information on this topic can be found in the configuration manual.

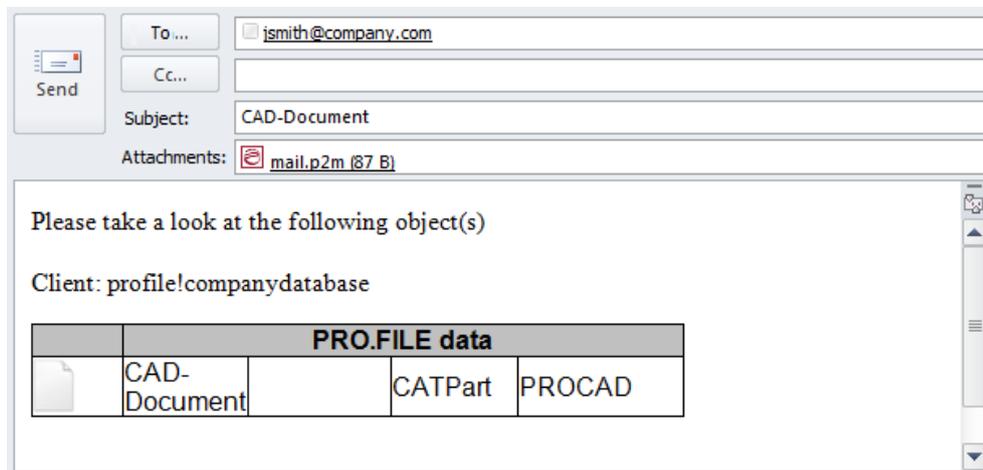
## 1.2 HTML Mail

Mail can now also be sent in HTML format. In earlier versions, only the text format was available for e-mail sent from PRO.FILE. With mail in HTML format you have now the possibility to configure the design of e-mails.

Among other things the HTML format offers the following functionality:

- Tabular display of dates
- Different Font Sizes
- Different Fonts
- Highlighting In Color

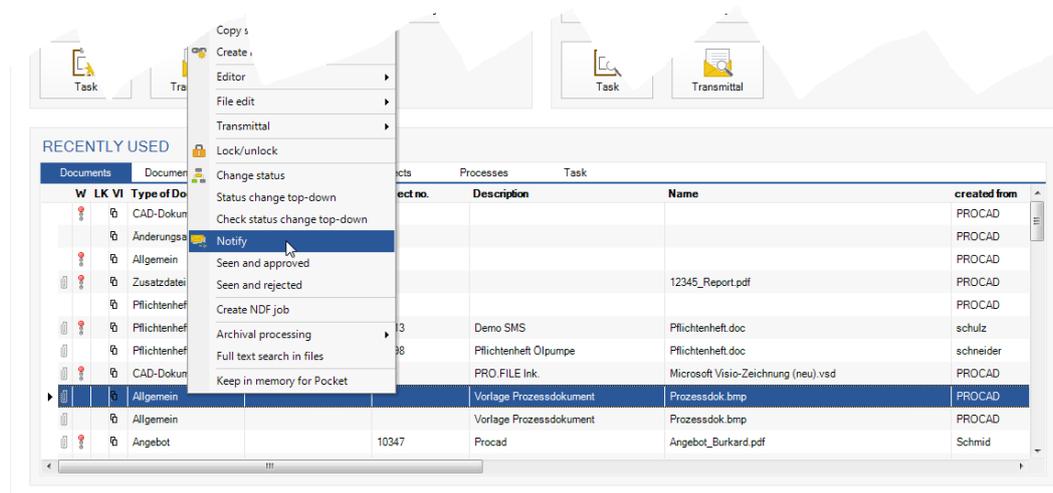
For the sending of HTML mail the same steps are to be carried out as with mail in the text format. For further information please read the following chapter.



## 1.3 Sending Information

Using the function "Notify" from the PRO.FILE menu "Edit", objects may be attached to an e-mail as referenced enclosures and sent to other users.

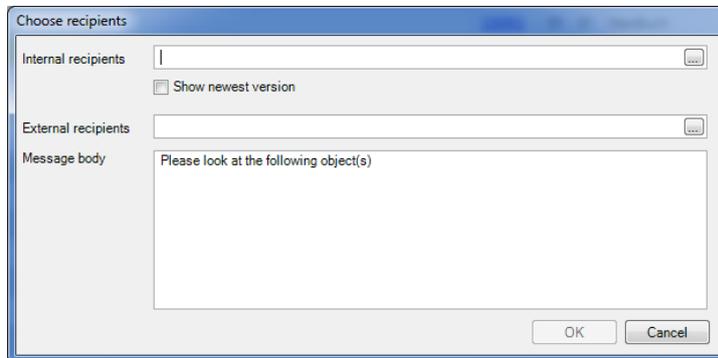
1. In order to inform a user about an object, first select the objects to be sent.
2. Then choose the "Notify" option from the "Edit" menu



The following applies when sending a message internally or externally:

- Messages sent internally are sent to PRO.FILE users, who receive a PRO.FILE link to the object in question.
- When messages are sent to external recipients, documents attached to document descriptions are sent as attached copy without a PRO.FILE link.

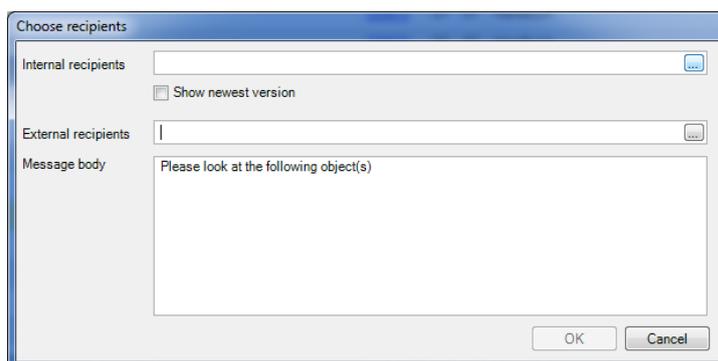
- PRO.FILE will open a dialog that lets you specify one or more PRO.FILE users in the "Internal Recipients" field or select a recipient from the drop-down menu. Multiple recipients must be separated with commas. It is possible to select multiple users in one step - press and hold <Ctrl> to select multiple users. In the message body, you can include additional comments to complement the default entry "Please look at the following object(s)".



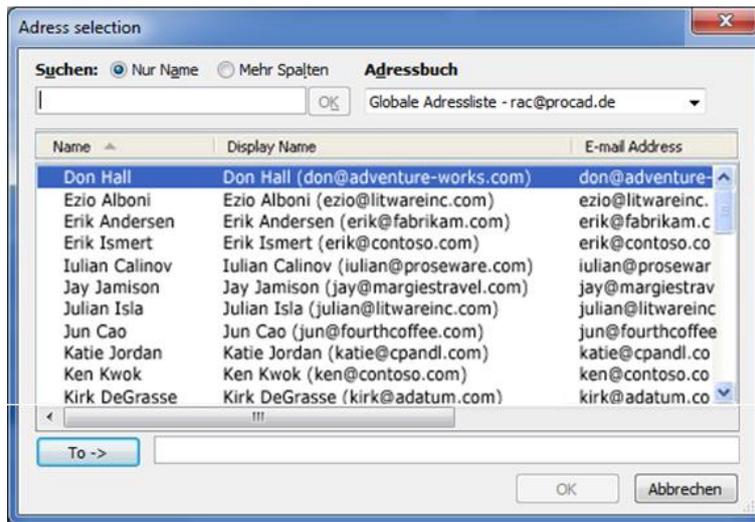
Use the drop-down menu on the far right side to select the internal recipients from a list.



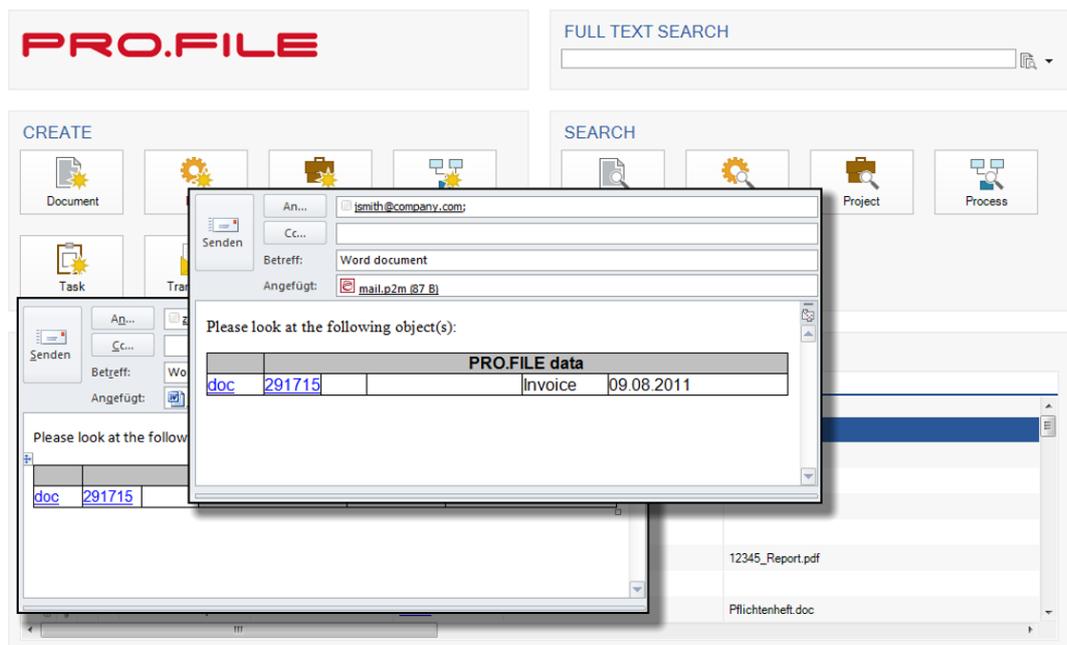
- When **external recipients** are to be selected, the selection window of recipients looks as follows:



Here you can select your recipients from the list:



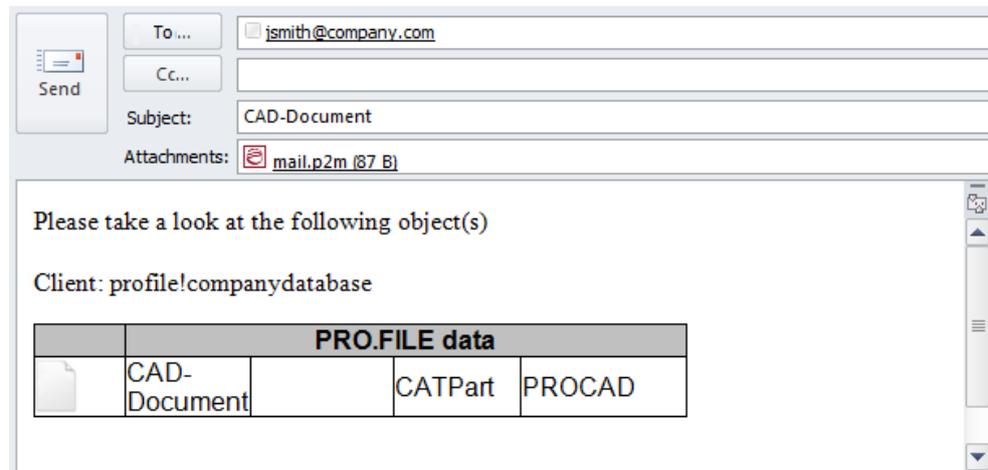
5. If internal and external recipients are to be informed at the same time, two messages will be sent:



6. The Mail Integration will now begin sending the data. The information window shows the user that the mail integration is sending information to the mail system. The final design of the message can be done in the mail system, provided that automatic sending is not configured.

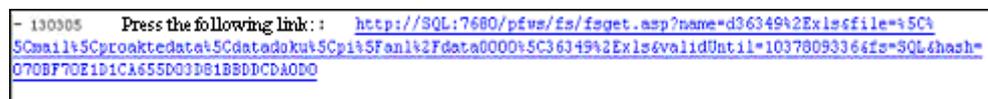


The information to be sent is displayed in a mail form if the Mail Connector is configured accordingly. In other cases, the e-mail will be sent without being displayed again.



The mail form already contains the e-mail address of the chosen recipient. In addition, a standard display of the reference icon and the pre-defined message text with the object ID number is displayed.

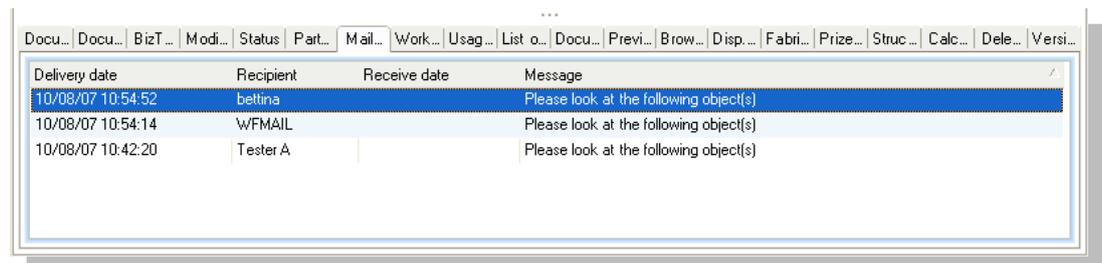
- It is now also possible to look at files from PRO.FILE without having PRO.FILE installed on the computer. A link in the mail could look then as follows:



To obtain this link, an FS-Link Server has to be installed on the server side. For more information on this, see the manuals "Installation PRO.FILE Server components" and "Administration PRO.FILE".

- Now the message can be completed by entering text into the text field.
  - To send the message, click the <Send> button in your e-mail system. Only at this point will the information be transferred to the chosen recipients.
- ⇒ If the users are informed in the way described, an entry will be made for each object in the **Mail log**.

The mail log provides an overview of which internal recipient was notified, when, and with which message.



The **status log** gives you an overview of the status of a document as well as information on which internal user was notified of status changes.

Date	Modified by	remark 1	remark 2
10/08/2007	procad	100: in Bearbeitung	Informed: bettina
10/08/2007	procad	100: in Bearbeitung	Informed: WFMAL
10/08/2007	procad	100: in Bearbeitung	Informed: Tester A

## 1.4 Information Flow during Status Change

With the PRO.FILE Mail Connector it is possible to define which users should be automatically informed for each type of work flow change as soon as the status change occurs. It is also possible to inform users automatically if an object reaches a certain target workflow state.

If automatic messages are configured for certain status changes (see Configuration Handbook), PRO.FILE will send a message to all pre-determined recipients in the case of this workflow change.

As soon as the last user – which the final implementation of the status change depends on – agrees to the workflow change the messages will automatically be sent by PRO.FILE.

This user then receives the following message:

Please take a look at the following object(s)

Client: profile!companydatabase

PRO.FILE data			
	CAD-Document	CATPart	PROCAD

Here it is also possible to look at files from PRO.FILE without having PRO.FILE installed on the computer. A link in the mail could look then as follows:



```
- 130305 Press the following link: : http://SQL:7680/pfvs/fs/fsget.asp?name=d36349%2Exls&file=45C%5Cmail%5Cproaktedata%5Cdata%okut%5Cp1%5Fani%2Fdata%0000%5C36349%3Exls&validUntil=10378093366fs=3QL&hash=070BF70E1D1CA655D03D81BDDCD40D0
```

In order to receive this link, a server FS-link must be installed on the server. PRO.FILE then will display the mail form before sending and provides the option of editing the text to be sent.

The mail form contains a reference icon on the sent PRO.FILE objects. In addition, the message text, the object ID number and the source and target status will be displayed. The sender can add to this information, if necessary.

Using the <Send> button will confirm the contents of the mail form. Only then will the message will be sent to the pre-defined recipients via the workflow process.

Receiving and opening the messages is described in the following chapter.



**Note:**  
Apart from the possible executed status change after sending the message, no further entries will be made in the workflow log

## 1.5 Receiving and Opening Messages

### Receiving Messages

If messages are sent in PRO.FILE using the function "Notify" or via a status change, the chosen recipients will receive a notice from the mail system that a message has arrived. For this, the notification function must be activated in the mail system. The received message can be opened like any other e-mail message.

### Opening Messages

Open the received message in your e-mail system. To edit the PRO.FILE objects (parts data, CAD data, documents), which are attached to the message as reference, it is sufficient to activate the PRO.FILE Reference Icon with the mouse. PRO.FILE will then automatically be opened. If required, the recipient must log in to PRO.FILE and will then receive a list of the referenced objects. To view the corresponding objects, the recipient must fulfil the following requirements:

- The recipient must have access to PRO.FILE and to the same database in which the objects are saved.
- The recipient must have corresponding rights for the objects. The information process using PRO.FILE Mail Connector does not influence the determined reading and access rights of the user.



**Attention:**

In case the message does not open, or does not contain a PRO.FILE Reference Icon, the PRO.FILE Mail Connector has not been installed correctly on the recipients' computer. In this case the "p2m" files must be linked with "showdata.exe". Please consult your systems administrator, if needed.

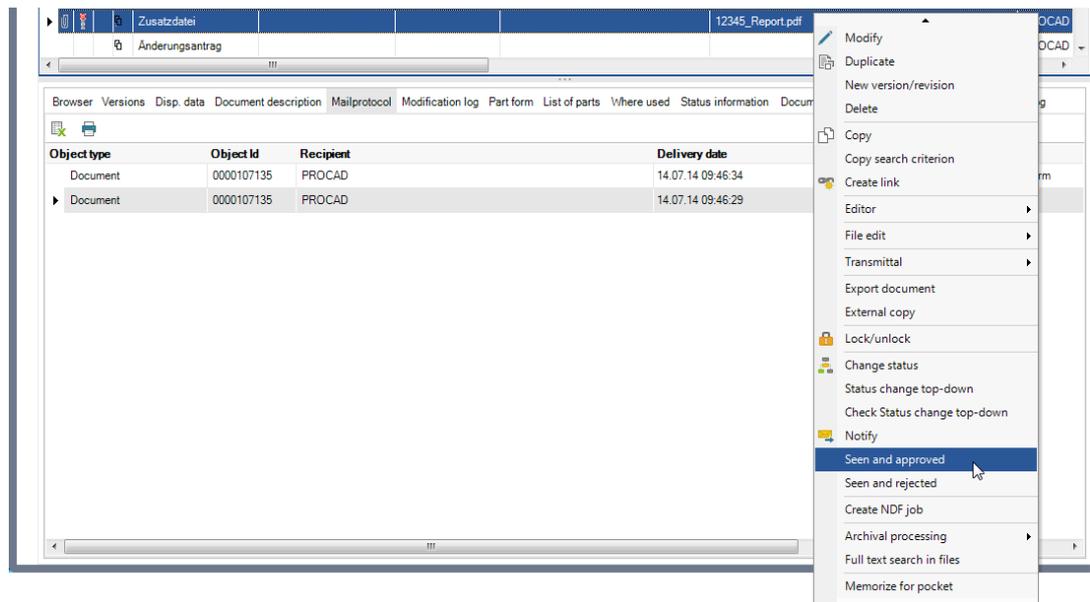


**Note**

Documents which are opened via the link cannot be changed.

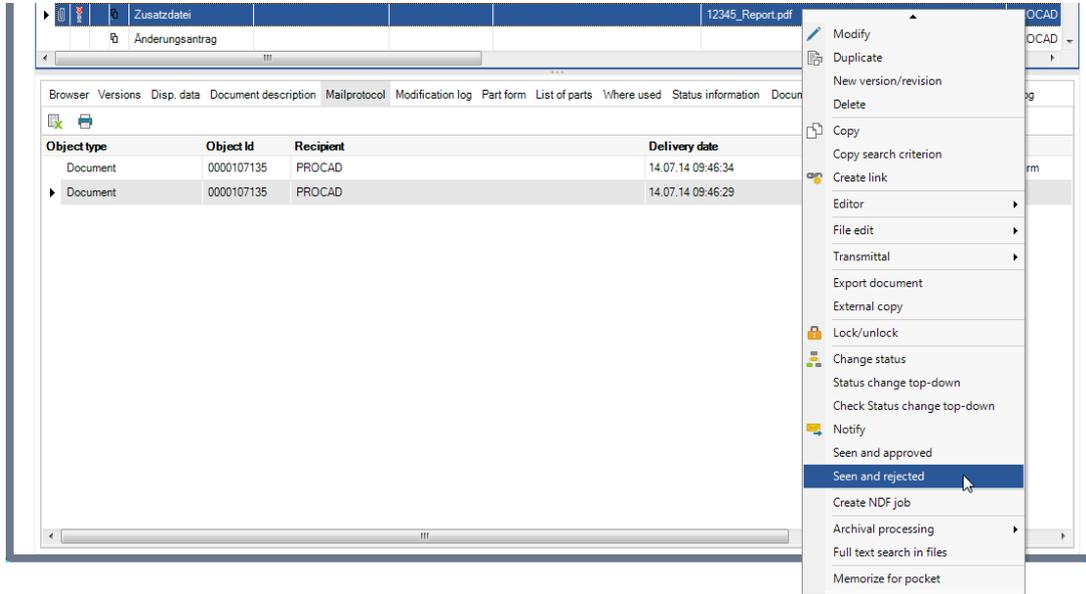
## 1.6 Seen and approved

After viewing the object, the user can decide what to do with it. He or she highlights the respective objects and selects **"Seen and approved"** from the "Edit" menu. An entry is made in the status log that indicates that the user has granted approval for this object..



## 1.7 Seen and rejected

If the user decides to deny approval for the respective object, he or she has to select "Seen and rejected" from the "Edit" menu. An entry is made in the status log that indicates that the user has denied approval for this object.



**Note:**

The notification of a user using the "Notify" function or following a status change does not affect the status of an object. If a user is notified and he or she responds with "Seen and approved" or "Seen and rejected", this will only result in an entry in the status log. A status change will neither be reversed nor will the user who has sent the message be notified that the recipient has denied approval for the object.

The following example shows the entries that PRO.FILE makes in the status log:

ID #	Date	Modified by	Start Status	Target Status
▶ 338990	11.07.2014 16:35:25	rac	1: PROCAD in Arbeit	Do not confirm

2

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