Operation PRO.FILE Taxonomy

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PROCAD

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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.

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 PRO.FILE Taxonomy - an overview

This documentation contains the following information on the operation of the PRO.FILE Taxonomy:

- [PRO.FILE Taxonomy for e-mail administration](#)
- [Prerequisites and configuration presets](#)
- [The operation of the PRO.FILE Taxonomy](#)

1.1   PRO.FILE Taxonomy for e-mail administration

In modern business correspondence, traditional mail has mostly been replaced by e-mail.
E-mails are business documents and must be handled accordingly. E-mails therefore belong into the customer or project folders in PRO.FILE.

Benefits of this proceeding

E-mails are legally and organizationally stored in the right place. The archival in PRO.FILE helps to comply with statutory provisions.

- E-mails are stored in the right place along with other documents relating to the customer or project.
- The e-mails are thus available to all involved parties of a project.

The **PRO.FILE Taxonomy** is an innovative technology for the automatic classification of documents in PRO.FILE. The taxonomy makes sure that documents can be quickly found based on jointly used criteria.

With PRO.FILE Taxonomy, e-mails are directly transferred to PRO.FILE from the Outlook inbox, by dragging the message into the desired folder. The messages are classified automatically and inserted into the correct customer or project folder.

Benefits of PRO.FILE Taxonomy

- All relevant e-mails are stored in the correct PRO.FILE project or customer folder. The correct customer or project number is automatically assigned to the e-mail.
- The tedious filling of PRO.FILE fields is no longer necessary.
- All required fields are filled correctly according to centralized templates.
- If configured correctly, e-mails can also be found by the PRO.FILE favorites.
- The inboxes in Outlook are kept tidy.

PRO.FILE Taxonomy is easy to use

- The storage of e-mails via drag & drop can be learnt without major efforts.

1.2   Prerequisites and configuration presets

> **Note: Prerequisites for the usage of the PRO.FILE Taxonomy**
>
> Prerequisite for the usage of the PRO.FILE Taxonomy is an existing installation of the integration PRO.FILE – Outlook VSTO and the corresponding configuration for the public folders in Microsoft Outlook (or Exchange Server).
>
> The configuration and administration of the PRO.FILE Taxonomy is described in the manual "Configuration PRO.FILE Taxonomy".

The behavior of the saving process of the PRO.FILE Taxonomy depends on the configuration made by the administrator.

- The configuration are contains the option "Mail store always interactive"

   Mail store always interactive
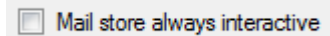
This option specifies whether the Checkin Wizard is always displayed and the saving process has to be confirmed by the user when the PRO.FILE Taxonomy is used in Microsoft Outlook.

Further reading:

- Manual "Configuration PRO.FILE Taxonomy"
- Chapter Saving e-mail interactively

2   The operation of the PRO.FILE Taxonomy

- [Automatically save e-mails via PRO.FILE Taxonomy](#)
- [Displaying the configuration of the PRO.FILE Taxonomy](#)
- [Starting the synchronization of a public folder](#)

Automatically save e-mails via PRO.FILE Taxonomy

The PRO.FILE Taxonomy gives the possibility to save e-mails to PRO.FILE by dragging it to a public folder in Microsoft Outlook.

Depending on the settings, the e-mail is then saved to PRO.FILE

- either automatically and without further query
- or after confirmation of the Checkin Wizard.

Note: Behavior during saving depends on configuration

Please note that the behavior of the PRO.FILE Taxonomy depends on the configuration settings. See the previous chapter: "[Prerequisites and configuration presets](#)"

The behavior differs in the saving of e-mails with or without attachments. Please see:

- [Saving an e-mail without attachments via PRO.FILE Taxonomy](#)
- [Saving an e-mail with attachments via PRO.FILE Taxonomy](#)

Note: Only possible in public folders configured for the taxonomy

The PRO.FILE Taxonomy is only available for public folders. Furthermore, these folders have to be configured for the taxonomy.

2.1   Saving an e-mail without attachments via PRO.FILE Taxonomy

The situation:

An e-mail in your inbox in Microsoft Outlook is to be saved via the PRO.FILE Taxonomy - but only the message without attachments.

⇒ The attachments of the e-mail are not to be saved as they only contain non-relevant information, e.g. VCF contact files or ads.

⇒ The body of the e-mail is afterwards no longer displayed directly in the inbox; a reference to the document ID in PRO.FILE and a corresponding P2M link is displayed instead.

Proceeding: Select the e-mails that you want to save to PRO.FILE in your Outlook inbox.

Drag the selected e-mail into the desired public folder. This folder has to be configured for the PRO.FILE Taxonomy.
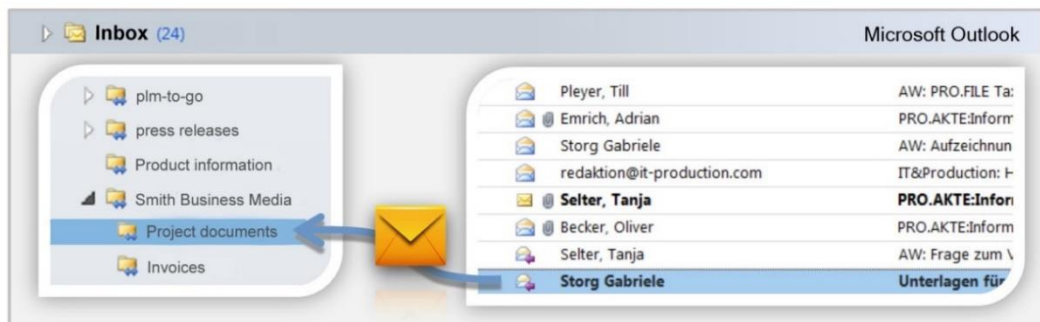
⇒   The e-mail is saved with the values configured for this folder.

2.1.1   Saving e-mail interactively

It is possible to adjust the configuration of the PRO.FILE Taxonomy, so that the e-mails are saved interactively. In this case, the PRO.FILE Checkin Wizard is displayed during the saving process. (see chapter "Prerequisites and configuration presets")

Proceeding:

1. Select the e-mails that you want to save to PRO.FILE in your Outlook inbox.

2. Drag the selected e-mail into the desired public folder. This folder has to be configured for the PRO.FILE Taxonomy.

⇒   The PRO.FILE Checkin Wizard is displayed.

3. Enter the metadata for the document description of the e-mail to be saved. (Detailed information on this can be found in the manual "PRO.FILE Advanced").

4. Confirm with <**Finish**>.

⇒   The saving process is thus finished.

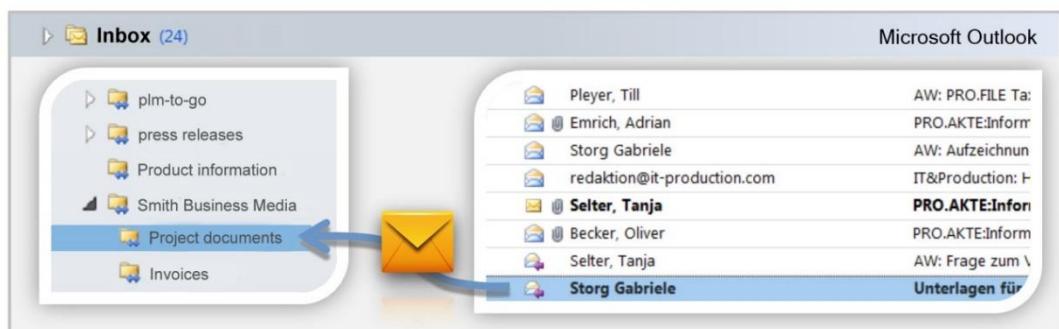## 2.2   Saving an e-mail with attachments via PRO.FILE Taxonomy

The situation:

An e-mail in your inbox in Microsoft Outlook is to be saved to PRO.FILE as a whole via the PRO.FILE Taxonomy, i.e. the entire mail with header, body and attachments.

⇒   In case of several attachments, the attachments to be saved can be selected.

⇒   The body of the e-mail is afterwards no longer displayed directly in the inbox; a reference to the document ID in PRO.FILE and a corresponding P2M link is displayed instead.

Proceeding: 1.   Select the e-mail that you want to save to PRO.FILE in your Outlook inbox.

2.   Drag the e-mail to the desired folder classified for the PRO.FILE Taxonomy
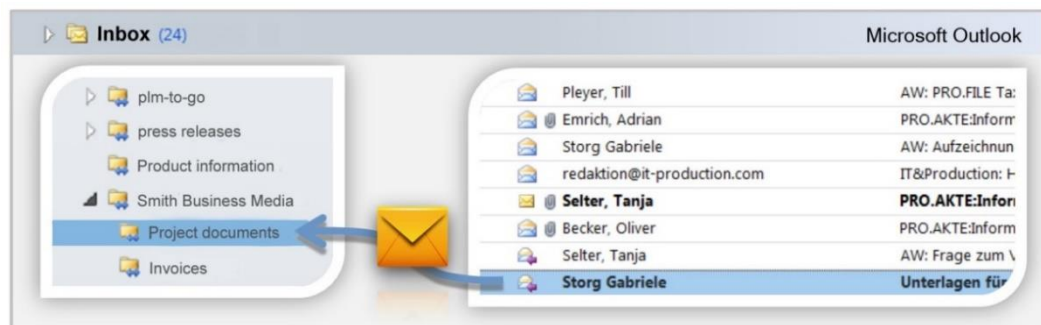
Note: Non-selected attachments

All attachments that are not selected in the wizard will not be saved to PRO.FILE and thus remain as attachments to the mail.

⇒   The wizard "Save e-mails with attachments to PRO.FILE" is displayed.

⇒   The Checkin Wizard is now displayed for each selected attachment. The attachment currently handled is indicated in the title bar of the Checkin Wizard.

3.   Enter the metadata for the document description of the e-mail to be saved.(Detailed information on this can be found in the manual "PRO.FILE Advanced: Creating, managing and changing PRO.FILE objects").

4.   Confirm with <**Finish**>.

⇒   The document descriptions created for the attachments to be saved are automatically linked in PRO.FILE to the document description of the e-mail.

⇒   The saving process is thus finished.

⇒   Depending on the settings in the Management Console, the body of the e-mail in the inbox is modified or not. The following options are available:

- The body is enhanced by a note referring to PRO.FILE.

- The body is replaced by a note referring to PRO.FILE.

- The body remains unchanged.

- A dialog is displayed to select one of the above options.

⇒ The PRO.FILE document description can be accessed by double-clicking on the link email.p2m (4 KB).

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

2.2.1 The wizard "Save e-mail attachments to PRO.FILE"

When new attachments of an e-mail are to be saved via the integration, the selection window "Save attachments to PRO.FILE" is displayed. Select the attachments you want to save to PRO.FILE.
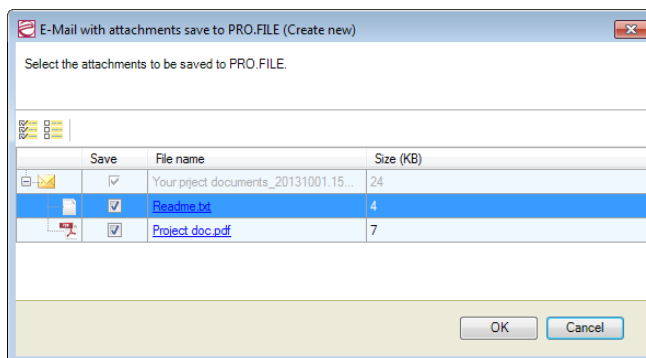
1. To do so, activate the corresponding checkboxes in the list ☑.

2. Confirm your selection with <OK>.

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

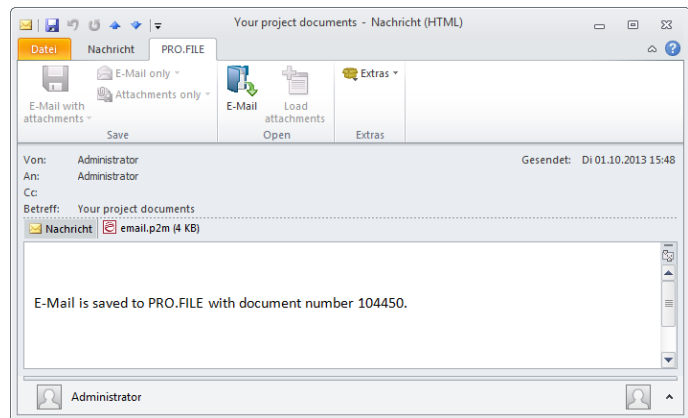⇒ All attachments that are not selected in the wizard will not be saved to PRO.FILE and thus remain as attachments to the mail.

Buttons for multiple selection		
	Select all attachments.	All attachments in the list are selected and the checkbox for saving is activated: ☑
	Deselect all attachments.	All selected attachments are un-selected and the checkbox for saving is deactivated: ☐
		Tabellentext
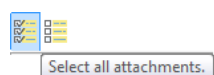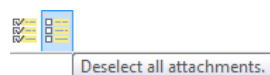
Information in the list

- The first column shows the system icon of the file type, the second column the selection for saving to PRO.FILE (see above), the third column the file name of the attachment and the fourth column the file size in kb.

- the first row indicates whether the e-mail is to be saved along with the attachment

    - If the checkbox in this row is activated, the e-mail is also saved to PRO.FILE and linked with the document descriptions of the attachments. As the saving process is triggered by placing an e-mail into the public folder, the e-mail is saved in any case, so this option cannot be changed at this point.

- The attachment file can be opened and displayed directly via the link that is available for the file names. When opened, the file can only be viewed, not modified.

2.3   Displaying the configuration of the PRO.FILE Taxonomy

When e-mails are saved via Drag & Drop with the PRO.FILE Taxonomy, fields of the document description are automatically filled.

As a user, in order to view the settings made for the different public folders in Outlook, proceed as follows:

Select the e-mail folder, the settings of which you want to view, within the public folders structure of Microsoft Outlook.

From the context menu (right mouse button) select the function "**Show PRO.FILE configuration**".
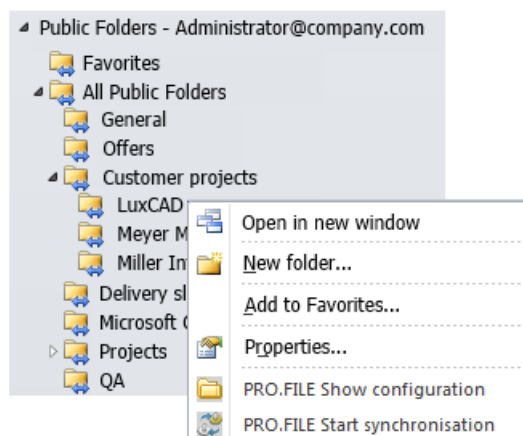
⇒   The overview "Public folders
     Taxonomy configuration" is
     displayed.

This overview contains the following
information:

- **Folder**:

  Indicates the Outlook folder, the
  configuration of which is displayed.

- **Document type**:

  An e-mail dragged into this public
  folder is automatically saved under
  this PRO.FILE document type.

- **PRO.FILE field**:

  Indicates the name of the PRO.FILE field into which values are written automatically
  when an e-mail is moved into this public folder.

- **Default**:

  Indicates the value that is entered automatically. A difference is made between:

  - **Fixed values**: A specific string of characters is entered into a PRO.FILE field.
    Example: For the public folder "LuxCAD GmbH" in the field "Project name" the
    value "LuxCAD".

  - **Variable values**: Variable information form the e-mail is transferred to the
    PRO.FILE field. Example: For the public folder "LuxCAD GmbH" in the field
    "Description" the variable "Mail.Subject" (corresponds to the entry in the subject
    line).

Note: Prerequisites for the usage of the PRO.FILE Taxonomy

The configuration of the PRO.FILE Taxonomy is made by the PRO.FILE administrator in
the PRO.FILE Management Console and is described in the manual "Configuration
PRO.FILE Taxonomy".

2.4   Starting the synchronization of a public folder

Note: Only in case of connection errors
The synchronization of a folder configured for the PRO.FILE Taxonomy is only necessary if the Checkin Wizard has been aborted by the user or connection errors to the PRO.FILE server have occurred. By default, this command does not need to be used.

When e-mails are saved via Drag & Drop with the PRO.FILE Taxonomy, these e-mails are saved to PRO.FILE.

In case of connection errors to the PRO.FILE server during the saving process or if the saving process is aborted by the user, the contents of a folder configured for the PRO.FILE Taxonomy can be synchronized manually.

During this synchronization, a check is made whether all e-mails in the selected folder are correctly saved to PRO.FILE. If any e-mails are not yet saved, they are saved to PRO.FILE, either fully automated or with manual confirmation of the saving process, depending on the configuration.

Proceeding:

For the synchronization of a public folder proceed as follows:

1. Select the e-mail folder you want to synchronize from the public folders structure in Microsoft Outlook.

2. From the context menu (right mouse button) select the function "**Start PRO.FILE synchronization**".
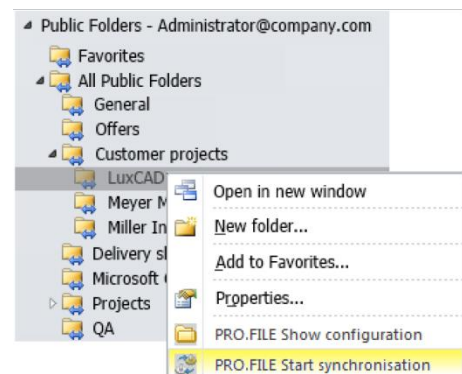
⇒   All e-mails contained in the selected folder are now checked for correct saving. If any e-mails in this folder are not yet saved to PRO.FILE, the saving process is started.

⇒   Depending on the configuration, the saving to PRO.FILE is made automatically or with confirmation of the Checkin Wizard.

⇒   The process "**PRO.FILE synchronization**" is thus finished.

3   Glossary

dependent tab

For the records selected in the main tab, the dependent tab display additional information. This may include, among others, the proof of usage, the structure view, the version list, the workflow log, the bill of materials, the modification list or the preview.

Place of filing administration

The place of filing administration is a function of the PRO.FILE Management Console. With this function you can configure the storage locations for files to be saved.

subscription

Function for the display of search results generated by favorites. A subscription only shows the most recent hits that have been added since the last call of the favorite.

login screen

On a login screen the user is prompted to enter the user name and password required for the login. For the PRO.FILE Windows Client, the login screen is displayed as a separate mask, for the PRO.FILE Web Client as a separate web page.

Views manager

The views manager is used to manage all saved list views. You can delete, rename or publish saved list views.

API

An application programming interface (API) is an interface made available by a software system for other programs for connections to the system.

Apart from the access to databases, hardware (e.g. hard disks or graphic cards), an API can facilitate the creation of component of the graphical user interface.

application server

The PRO.FILE application server is always the server, on which a fill PRO.FILE client is installed. This application server is addressed by less powerful clients of a central installation.

Task (object type)

An object of the type "task" contains information on a task assigned to a user. Tasks can be used as individual objects, in the context of processes, or in the context of projects.

initial status

In case of a status change, an objects changes from an initial status to a target status.

Autologin

When the autologin function is activated, PRO.FILE compares the name of the current Windows user with the names registered in PRO.FILE. If a user of the same name exists in PRO.FILE, this user is logged in to PRO.FILE automatically without password check.

autostart favorite

A favorite can be defined as autostart favorite, so that this favorite is automatically displayed when PRO.FILE is started.

assembly

An assembly is an a group representing an object consisting of one or more parts and/or sub-assemblies.

assembly family

Like for parts, variants can also be created for assemblies. The sum of the variants including the "mother assembly" (sometimes also referred to as generic) is referred to as assembly family.

single-level bill of materials

A single-level bill of materials displays all elements of the assembly with indication of the structure level for all single parts, without displaying the structure itself.

part

A part represents the totality of machinery or design elements describing any element of a machinery design that cannot be sub-divided (w/r/t its function).

user administration

The administration of PRO.FILE users and groups (login data, permissions, etc.) is made via the node "User administration" in the PRO.FILE Management Console.

COLD application

Computer Output on Laser Disk (COLD) describes a method for the transfer of computer output streams created by data processing systems into an archiving system.

database type

The PRO.FILE installation distinguishes the allowed database type Microsoft SQL.

database user

The database user is a user who has direct access to the database via the database management system and a corresponding user account.

database server

The database server is the computer on which the database is installed and which is addressed by the clients.

DBANWPFAD

The environment variable DBPFAD points to the local installation of PRO.FILE. The variable DBANWPFAD points to the installation path of the configuration files. If the configuration files were installed locally, both variables may point to the same path.

DB relation

As soon as a file is saved in PRO.FILE, the PRO.FILE database relation is established. This relation allows editing the documents via the integration and applying the PRO.FILE functions to this file.

DBPFAD

The environment variable DBPFAD points to the local installation of PRO.FILE. The variable DBANWPFAD points to the installation path of the configuration files. If the configuration files were installed locally, both variables may point to the same path.

document

The object type "document" consists of two elements in PRO.FILE: 1) The document description – The element visible in PRO.FILE ist he document description, consisting only of metadata that describes the actual document. The document description consists of fixed metadata (valid for all documents) and variable document data (only for documents of a specific type). 2) The document file is saved along with the document description. Via the document description, a file can be easily identified as the description contains a reference to the actual file. To edit a file, the file has to be accessed via the document description in PRO.FILE.

document ID

Unique ID assigned to a document by PRO.FILE.

document description

The object type "document" consists of two elements in PRO.FILE: 1) The document description – The element visible in PRO.FILE ist he document description, consisting only of metadata that describes the actual document. The document description consists of fixed metadata (valid for all documents) and variable document data (only for documents of a specific type). 2) The document file is saved along with the document description. Via the document description, a file can be easily identified as the description contains a reference to the actual file. To edit a file, the file has to be accessed via the document description in PRO.FILE.

document special list

A document special list is only displayed when documents are saved from CAD systems to PRO.FILE via the integration. The document special list contains information on the status, versions, lock flags, usage, etc. of the selected documents.

document characteristic

A document characteristic is a specific information for a document type. The document characteristics depend on the document type selected in the fixed document description.

document type

The document type is a classification for documents of a specific file type. The document type is used to classify this file automatically within the document record. Document types can be "CAD document", "Report", etc.

output format

Output formats are configurable display types (masks, lists, browser views, …). The configuration is made via the PRO.FILE Management Console.

EAI

The Enterprise Application Integration (EAI) in PRO.FILE allows the access of the current database to an external database. The EAI configuration is part of the PRO.FILE Management Console.

external references

External references are references going beyond the relation of a document to a specific document (e.g. softlinks).

favorite

A favorite contains several defined search criteria. It is used to perform a specific search process without having to enter the search criteria again.

favorites bar

The favorites bar on the left-hand side of the PRO.FILE Windows Client contains a context menu which gives access to all functions required in the context of favorites and subscriptions.

File Server Link

Via FSLink you can access files that are saved in PRO.FILE without an installed PRO.FILE client. For this, a link to the file on the PRO.FILE file server is copied to the clipboard.

format generator

The format generator is addressed by the job server for the generation of NDF documents and creates pre-configured NDF documents from documents of a specific CAD system. Depending on the target format, an additional conversion may be required.

form view

Contrary to the list view, the form view only contains information (displayed in fields) for one object.

main tab

The "workplace" in PRO.FILE. The main tabs list the search results. Here you can select, modify or create your data records.

guest role

For a user without a specific role you can specify a guest role as access permission for a project. Via the guest role you define the general access permissions for all users who are not part of the project.

gateway trace

If the environment variable GTRACE is set, the communication with the PRO.FILE database is logged (gateway trace) The scope of the logged data is specified with the variable GTRACELEV.

generic

A generic is the basic part or basic assembly – i.e. the "mother" – of a part family or assembly family. All variants within the family refer to this generic.

Embed graphic

Graphic formats supported by Word or Excel and saved in PRO.FILE can be linked or embedded in your Word/Excel document via the integration. 1) Link graphic: PRO.FILE saves the link between the document and the graphic (not available in Excel). Embed graphic: PRO.FILE does not save any link, as the graphic becomes part of the main document.

Link graphic

Graphic formats supported by Word or Excel and saved in PRO.FILE can be linked or embedded in your Word/Excel document via the integration. 1) Link graphic: PRO.FILE saves the link between the document and the graphic (not available in Excel). Embed graphic: PRO.FILE does not save any link, as the graphic becomes part of the main document.

ID number

The ID number is a number used for unique identification of an object. In the context of PRO.FILE, each object has an ID (document ID, part ID, …).

Notify

The function "Notify" allows to notify other PRO.FILE users (internal recipients) or other persons without PRO.FILE access (external recipients) via E-Mail about the status of a PRO.FILE object. For this function, the PRO.FILE Mail Connector is required.

Installation Point Manager

The Installation Point Manager (IPM) facilitates the summary of several setups to configuration profiles, which install entire software bundles (adjusted to the user profile) in silent mode. The IPM generates an installation script which can be deployed to the client computers.

instance (CAD)

An instance is a specific variant of a defined mother object (generic). Instances have the same properties like the mother object, but differ in the values of individual parameters. Instances are usually controlled via family tables.

Job Server for the NDF generation

For some CAD systems, the creation of a copy in a neutral format can be controlled via the status. For instance, when a CAD part or assembly is released, the automatic creation of a TIFF drawing of this part or assembly can be triggered. This neutral format document is then automatically saved in PRO.FILE and linked to the original document. Depending on the configuration, an automatic update of the title block may take place at this moment. The neutral documents are created by the format generators, the configuration of which is made in the PRO.FILE Management Console.

node

A node is the branching of a tree structure and thus the connection of a superior element to one or more sub-elements.

component tree

The component tree is display of a CAD object in form of a tree structure within a CAD system.

layer

The functions "markup" and "redline" create additional layers in addition to the actual document. These layers are stored as separate files. The administration of these files depends on the system used for redlining.

list view

Contrary to the form view, the list view contains a list of all objects found by a search with specific criteria.

local work folder

To use the functions of the local saving od the CAD system in combination with the PRO.FILE functions, the Workcenter administrates a local work folder. The content of this workfolder is supervised by PRO.FILE when working with the integration.

lookup field

PRO.FILE field displaying information from an external database table. The information is not saved in the PRO.FILE database. The database only saves the link to this information, i.e. the contents of this information may change without the PRO.FILE record being edited.

mail integration

Connection of an E-Mail system (MS Outlook or Lotus Notes) to PRO.FILE.

Mail log

Dependent tab which tracks which user has been informed when about the selected PRO.FILE object.

Managed Copy

Managed Copy (MCopy Editor) allows the targeted saving of single modified parts and assemblies, the changing of their names and the subsequent creation of a new bill of materials. The user can decide which elements are to be saved. When the function Managed Copy is selected, a list of all models referenced by the loaded assembly in the CAD system is displayed.

Form designer

Via the Form designer in the PRO.FILE Management Console it is possible to configure and adjust the forms, browser and list views and CAD lists used in PRO.FILE.

Keep in memory

To create links between objects in PRO.FILE, these object can be put in the PRO.FILE clipboard via the function "Keep in memory".

multi-line field

A multi-line field is used to store information with an unlimited number of characters.

NDF

Neutral data format (e.g. PDF, TIFF).

NDF job

Via pre-defined actions, the automatic creation of NDF documents can be triggered. In case of such an action, a job is created which is then processed by the PRO.FILE Job Server.

object

In PRO.FILE the word "object" is the overall term for parts, documents, projects, transmittals, processes and tasks. The object types define the usage and availability of the corresponding information (meta data).

original file

The original file or original document is the status and name of a file before it has been saved to the PRO.FILE database.

original file name

If a file is attached to a document description in PRO.FILE, this file is renamed according to a defined logic (e.g. document ID). The original name of the file is saved in the document description, to make a later identification of this document via this name possible.

PDM

Product data management (PDM) is a concept with the aim of saving and managing product-defining, product-representing or product-presenting data and documents as result of the product development process and to make these results available to later phases of the product life cycle.

phantom element

By the usage of the phantom function, an entire assembly is saved under one single part master record. As a consequence, this assembly is treated like a single part. The parts contained in the assembly are saved as phantom parts and cannot be explicitly accessed from PRO.FILE.

PLM

Product Lifecycle Management (PLM) is a system of IT solutions for the management of all data occurring during the design, manufacture, storage and sale in a uniform way. In an ideal case, all areas or systems being in touch with such data access a common data basis.

position number

A position is the place of an object within a list, e.g. of a part within a bill of materials of an assembly. Within the drawing and the bill of materials, a position is assigned a position number (which can be displayed by balloons).

PRO.FILE Management Console

The PRO.FILE Management Console is the central location for settings and configurations relating to PRO.FILE and directly integrated applications.

PRO.FILE Checkin wizard

The Checkin wizard supports the user with the saving of files, parts and document in PRO.FILE by making e.g. the different document types and their characteristics available for selection.

PRO.FILE Home page

The PRO.FILE Home page is displayed by default when PRO.FILE is freshly started. From here, you have access to the central functions of the software.

PRO.FILE Web Client

The PRO.FILE Web Client is the browser-based variant of the PRO.FILE Windows Client. Contrary to the Windows Client, the Web Client does not need to be installed on the client computer. An installation of the central module can only be made by the administrator, since the Web Server has to be installed into the Microsoft IIS and a connection to a cache server needs to be configured.

PRO.FILE clipboard

The PRO.FILE clipboard works in analogy to the regular Windows clipboard but is only used by PRO.FILE, e.g. for the function "Keep in memory".

PRODB

Via the variable PRODB the database the PRO.FILE applications are to connect to is specified.

project (object type)

Projects define a larger planned task to be realized within a company. During a project's runtime documents and parts or assemblies belonging to this project are created. To make this relation visible and manageable, PRO.FILE offers the object type "project". With this object type it is possible to create a task- and project-related structure for all objects (parts, document, sub-projects) arising in this context.

process (object type)

A process describes a procedure that always takes place in the same manner. Processes in PRO.FILE are a logical sequence of tasks (see task (object type)) describing the order of the procedure. These sequences may even contain branches and parallel task operations and can be displayed as flow charts.

redlining

With the "redlining" function you can make "handwritten" notes, remarks or change instructions for the creator of a CAD drawing within the drawing – as was done earlier on paper with a red pencil. For this, the editor does not need the actual CAD source program of the drawing but an appropriate redlining/markup program. This program can also be used for pure document viewing. If the editor wants to make any notes etc. on the drawing, this is made on a transparent layer which is placed over the actual document, thus

leaving the actual drawing unchanged. This transparent layer is saved in a separate red-line/markup file.

balloon

Within a drawing of a CAD model it is possible to display the different bill of materials positions by balloon-type objects with the corresponding position numbers.

tab

Tabs are used to display information and input fields of a program window on several dialog layers in one window. By clicking the tab of the corresponding layer, this layer is brought into the foreground and the data can be viewed or modified.

report

The report generator can be used to extract data from PRO.FILE in CDF (comma-delimited file) format and to access programs to process or display this extracted data. Reports can be configured in cfg files in table form. General reports contain information on fixed areas, which are defined in the file "report.cfg". Specific reports deliver information on selected positions of a PRO.FILE list.

reservation list

When opening objects via a CAD integration, you can lock these objects for other users – thus reserving them for your editing process. Depending on the integration, the reservation list (or lock list) can be accessed via a menu function of the integration or can be configured in the PRO.FILE Management Console.

role

A role defines the functions and permissions a user or user group. The assignment of a role to a specific user/group is made in the PRO.FILE Windows Client. The properties of the role are configured in the PRO.FILE Management Console.

item class (IC)

An item class is the summary of item characteristic keys of a group of similar objects. Item characteristic keys describe the item characteristics or properties of an object.

SmartLink

Data displayed in PRO.FILE in forms, lists and especially in browsers often consists of references to further data, e.g. the ID number of the project a document belongs to, the ID of a part a document is linked to, the name of the name of the object creator or even non-PRO.FILE information such as the article number from the ERP system. The idea of a

SmartLink is to signal to the user (by underlining the information in blue) that this information automatically redirects to the source of the referenced information for direct display.

SmartSearch

The SmartSearch is a hybrid between the regular options of the search form and the favorites. A SmartSearch is a search form that only contains the desired amount of fields thus reducing the complexity of the search process.

Softlink

Recursive links of a part to the assembly in which the part is used. In order not to create an endless loop when loading the part (assembly contains part, part references assembly, assembly contains part, …) this link is saved in PRO.FILE as a so-called softlink.

lock

An object is locked when it is checked out for modification in order to avoid concurring changes. Such a lock is indicated in the database with a lock flag.

status administration

Via the status administration of PRO.FILE you can make sure that an object in a specific status can only be accessed by users authorized for this status and that only actions planned for this status can be undertaken with this object.

status change

A status change describes the change of a PRO.FILE object from one workflow status to another. Depending on the configuration, this may affect the access rights and responsibilities for further editing. Furthermore, you can configure that a specific action is to be triggered by a status changed (e.g. notification, automatic NDF creation, …).

status change top - down

Via the function "Status change top – down" you can decide which subordinate objects are to follow the selected object to the target status during the status change.

structure object

Objects belonging to the structure of a superior object.

bill of materials

A bill of materials is a structured disply of parts or assemblies required for the manufacture of a product. A bill of materials sorts the parts of a system according to their structural properties.

bill of materials editor

Editor integrated in PRO.FILE for the editing of bills of materials.

part (object type) / part description

A part contains the descriptive properties of a machinery part or an assembly. The object type part in PRO.FILE only contains metadata. The actual part as a file can be attached to a document description, which in turn can be linked to the part description.

transmittal (object type)

Transmittals are digital dispatch lists for the support of the document exchange between contractors and suppliers, in which documents that are stored in PRO.FILE are listed. Transmittals are used to document the dispatch of documents in the collaboration of contractors and suppliers.

environment variable

Via environment variables you can make certain settings for PRO.FILE, e.g. the language or the database path.

sub-assembly

Assembly that is contained in a superior assembly.

URL

A URL (Uniform Resource Locator) identifies an localizes a resource via the used network protocol (e.g. HTTP) and the location of the resource in computer networks. A URL is often referred to as address.

link

It is possible to link PRO.FILE objects with each other. When assembly structures are saved via a CAD integration, this is done automatically (assembly is linked to part and document descriptions). However, it is also possible to create links manually. For instance, a document can be linked to a project, so that the role permissions of the project also apply for the document.

versions

If a document has been versioned, older versions or revisions of the currently displayed document record are saved in the database. The dependent tab "Versions" in the PRO.FILE Windows Client lists all of these available older versions and revisions.

version conflict

A version conflict occurs if a document, of which a newer version already exists in PRO.FILE, is to be opened, edited or saved.

version counter

The version counter indicates the version number of an object within the version chain. The revision counter indicates the revision number of an object within the revision chain.

Where used

The tab "Where used" in PRO.FILE displays the superior objects to which the selected object is referenced.

Web Report

Apart from the rendering for preview purposes, the output of reports is more and more transferred to the server side. A powerful and cost-effective variant of this technology are the Microsoft SQL Server Reporting Services. Instead of reading, processing and displaying data on the client side, the server reads the contents closer to the database and renders HTML to the client. This technology is used since PRO.FILE 8.4 as an alternative to the classic report generator interface. The idea is to display the rendered HTML in a new dependent window. When a different object is selected in the main tab, a request is sent to the server and a new HTML page is displayed. The user can choose from different reports configured for the object type displayed in the main tab.

WebServer

When the PRO.FILE Web Client is used, this client needs to contact the PRO.FILE Web-Server. This is the installation of a web server requiring the Internet Information Server on the target system.

WIBU dongle

Before you can start the setup of PRO.FILE components the WIBU dongle has to be installed and made accessible to all client computers. This is required for the licensing of PRO.FILE and returns a unique address which can be queried by the PRO.FILE License Server. The WIBU dongle is available in a USB or parallel port variant. The dongle needs to be installed before licenses can be loaded and PRO.FILE can be started.

wildcard

Place holder character (e.g. "*"), which can be used e.g. for searches via the search form.

Workcenter

The Workcenter supports you in the administration of PRO.FILE components loaded from PRO.FILE and saved locally. In the Workcenter you can specify a work folder for each project / each database, lock or release components, obtain detailed information on parts, documents and bills of materials or delete individual objects from the work folder.

workflow

Pre-defined sequence of activities within a company, underlining the operative-technical view at processes. The individual steps of this workflow are referred to as status and the

transitions as status changes. The configuration of these steps is made in the PRO.FILE Management Console.

dictionary field

There is the requirement to fill fields in several languages, i.e. the user sees the term in his language and not in a selected company language – an English user sees 'screw' while a a German user sees 'Schraube'. Before PRO.FILE 8.4, this requirement had to be addressed by filling several field, one field being required for each language, and all other fields being filled via reference lists or cross tables. With the dictionary fields in PRO.FILE 8.4 it is now possible to translate the displayed field content during the display. In order for this to work, a dictionary file with precise translations of the key words in all used languages has to be available.

drawing

A drawing is usually a 2D document created by a CAD system. A drawing file converted into a neutral format (e.g. PDF) may also match the definition of a (CAD) drawing.

drawing legend

The drawing legend is the total of all labeling elements of a CAD drawing, which may include the title block, the bill of materials and the modification list.

drawing frame

A drawing frame displays the frame of a CAD drawing with the title block, text fields and other elements of the drawing legend. The actual name of this element varies depending on the CAD system. A drawing frame can be saved as a separate template.

drawing title block

The title block of a drawing is part of the drawing legend. It contains a border and different sections for technical and administrative information on the drawing. The title block should contain enough information to identify the drawing type (e.g. assembly drawing) and required details.

central configuration

In case of a central installation, the application is installed at a central location and can be accessed by other client computers. Since PRO.FILE V8 only the configuration files can be installed centrally (central configuration) – a local client installation is nonetheless required.

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