Operation Integration PRO.FILE MS Excel VSTO

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PROCAD

Registered Trademarks:

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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 Welcome to the integration PRO.FILE – Microsoft Excel VSTO

The Product Data and Document-Management System PRO.FILE classifies and manages documents and records from the technical and administrative sector. PRO.FILE works fully integrated in Microsoft Excel. Documents can be stored directly from Microsoft Excel in the PRO.FILE database.

The functions for saving and searching are embedded in the menu "PRO.FILE", so that processing and creating on one hand and storing of documents on the other can take place without changing the user programs.

During the saving process, the documents are classified with characteristics and metadata. These characteristics can be used later to find the document fast. Documents can be assembled in a folder or assigned to projects or products. It allows direct access to complete records needed within the scope of a business proceeding.

All documents administrated in PRO.FILE are stored in a secure "electronic vault". The ability to access documents quickly allows the user to take the additional time for other productive activities.

1.1 Please note: Important information

In order to use the integration PRO.FILE – MS Excel successfully, the following configuration notes need to be observed:

Note: Viewer for Office documents when using PRO.FILE variables

For the correct display of Excel documents with PRO.FILE variables, you should not use a separate viewer. A viewer does not automatically update the PRO.FILE variables upon opening, which may lead to the incorrect display of text information. In such cases, you should use Microsoft Excel for viewing Excel files.

Detailed information on the configuration of the integration can be found in the manual "Installation and administration Integration PRO.FILE Excel VSTO".

1.2 First steps with the PRO.FILE integration

Via the read, save and information functions of the PRO.FILE integration, the user can access PRO.FILE directly from Microsoft Excel and use the PRO.FILE functions and information.

The first steps with the integration are explained in the following chapters:

- [Where can the functions of the PRO.FILE integration be found in Excel?](#)
- [How to log in to PRO.FILE?](#)
- [An overview of the integration functions](#)

> **Note:**
>
> The description of the integration functions assumes that the basic functions of PRO.FILE are known to the user. Additional information can be found in the manual "Operation PRO.FILE for Beginners".

1.3 Where can the functions of the PRO.FILE integration be found in Excel?

In order to access the functions of the PRO.FILE integration directly from Excel, the integration offers a menu "PRO.FILE" in the ribbon bar of MS Excel.
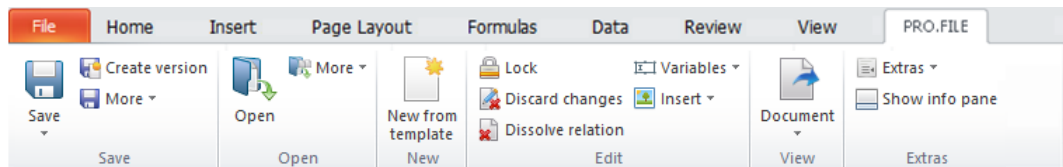
Via these buttons you can access all functions of the integration. A short overview is provided in the following chapter "[An overview of the integration functions](#)".

1.4   An overview of the integration functions

This chapter is to give you a short overview of the options and functions of the integration PRO.FILE – Microsoft Excel. Detailed information on each of these functions can be found in later chapters of this manual.

Save

These menu functions are used to save documents in PRO.FILE – as new document, as modified document or as a new version. (See chapter "Saving a document to PRO.FILE")
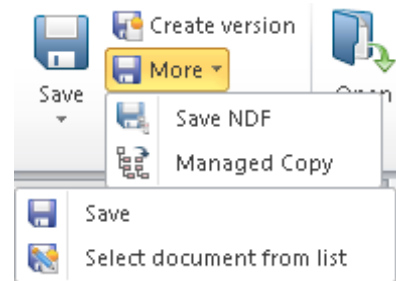
- **Save**
  Changes that are made in a document or a linked object are transferred to PRO.FILE with this function. A prerequisite for this is that the document has been opened for modifying and locked in PRO.FILE. If the document is not taken out you can use the function "Lock". You can also use the function "Save" to save new documents (without PRO.FILE relation) to PRO.FILE via the Checkin Wizard.

- **Select document from list**
  The current document can be saved to an existing document description. If there is already a file saved to it, you will be asked if you want to overwrite the document or version it.

- **Version**
  This function is used to create a new version of a document with the changes just made to the active document. If new OLE objects and/or graphics are linked to the document, these are also saved in PRO.FILE and linked to the new version.

- **Save NDF**
  Saves the current document as NDF and stores it in PRO.FILE.

- **Managed Copy**
  Via the function "Managed Copy" a document, including all objects/graphics and structures linked in PRO.FILE, can be duplicated. During this process the user can choose which of the existing linked elements is to be copied as well or is to be rereferenced.

Open

With this function a document saved in PRO.FILE can be opened in MS Excel. (See chapter Opening documents from PRO.FILE
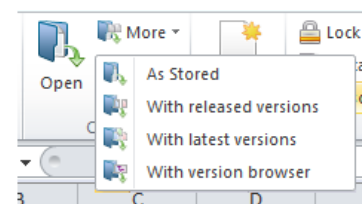
- **Open**
  The selected document is opened from PRO.FILE. If additional objects from PRO.FILE are linked to this document, the "Open" function behaves as configured in the PRO.FILE Management Console via the parameter "Version load options dialog".

- **As stored**
  The selected document is loaded from PRO.FILE as it has been saved most recently.

- **Open with latest versions**
  The selected document will be taken from PRO.FILE with the newest version of the linked objects.

- **Open with released versions**
  The selected document will be taken from PRO.FILE with the newest released version of the linked objects.

- **With version browser**
  The selected document is opened from browser with the version constellation selected by you.

New

With the function "New from template" a new document can be created based on an existing document in PRO.FILE. During this process, the new document is directly saved in PRO.FILE and then opened for modification in MS Excel. See Chapter ""New from template" for the creation of documents"
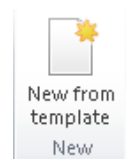
Edit

This area of the PRO.FILE ribbon allows access to the following functions:
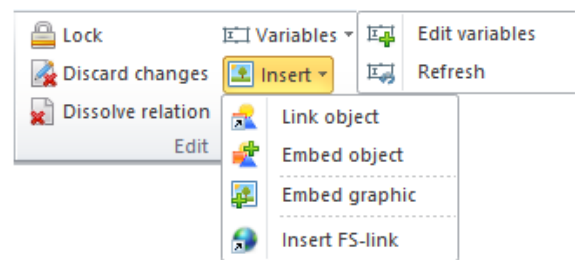
- **Lock**
  This function locks the current document in PRO.FILE. Also see the chapter "Lock: From viewing to editing").

- **Discard changes**
  Changes to the current document are discarded, the file is loaded again from PRO.FILE with its last saved status (see chapter "Discard changes)

- **Dissolve relation**
  With this function the connection between the current document and PRO.FILE is removed. The Excel document is then no longer connected to the PRO.FILE database. It can then be saved under a different document description in PRO.FILE (see chapter "Dissolve relation").

- **Edit variables**
  This menu entry offers the menu functions to add, remove or update PRO.FILE variables.
  (See chapter "Insert PRO.FILE information as document variable").

- **Refresh**
  This function allows you to update inserted PRO.FILE variables within a document.

- **Objects**
  Objects saved in PRO.FILE can be linked to or embedded in your document with these functions (see chapter "Quick inserting and linking of files and graphics from PRO.FILE").

- **Link object**
  Objects that are saved in PRO.FILE can be linked with the current document. The link between the document and the OLE Object Is created in PRO.FILE.

- **Embed object**
  Objects that are saved in PRO.FILE can be embedded in the current document. No link must be created in PRO.FILE, as the OLE-Object is a part of the document.

- **Graphics**
  Graphics saved in PRO.FILE can be linked to your document with these functions (see chapter "Quick inserting and linking of files and graphics from PRO.FILE").

  - **Embed graphic**
    Graphic files that are saved in PRO.FILE can be embedded in the current document. No link has to be created in PRO.FILE, as the graphic is a part of the document

- **Insert FS-Link**
  Using this function it is possible to define a selected section of text as a hyperlink. Once defined, the selected text is shown, as usual for hyperlinks, in blue and underlined. By double clicking on the link, the linked document can be opened.

View

The functions in this group are used to display information from PRO.FILE.
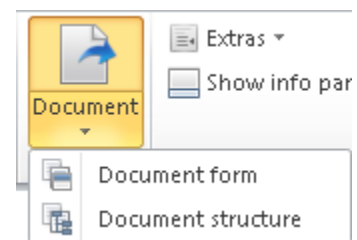
- **Document / Document form**
  Displays the document description for the active document in PRO.FILE.

- **Document structure**
  Displays the document structure of the active document. This list also includes documents without PRO.FILE relation.

Extras

This group gives access to the following functions. See chapter "Extras, information and help"
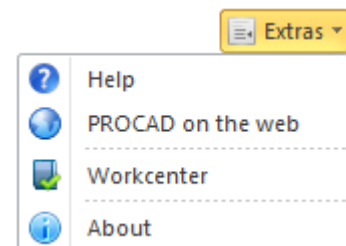
- **Help**
  This function is used to display the online help.

- **PROCAD on the web**
  Opens the official web site of the company PROCAD.

- **Workcenter**
  Opens the Workcenter window. There you find the local storage of documents opened from PRO.FILE.

- **About**
  For information (e.g. version number) on the current configuration of the PRO.FILE integration.

- **Show info pane**
  Shows the infor pane at the bottom of the screen. This pane contains infromation on document ID and mode.

1.5   How to log in to PRO.FILE?

When an integration function is selected for the first time within a Excel session, PRO.FILE is started and, if PRO.FILE is not yet running in the background, a login is required.

Via the login the user is identified by his/her PRO.FILE user name and password. The login also activates the configured function access rights and permissions for this logged-in user.

In the login screen that is displayed please enter:

- your PRO.FILE user name,

- your PRO.FILE password.

Confirm with <**Login**>.

The PRO.FILE GUI is displayed.
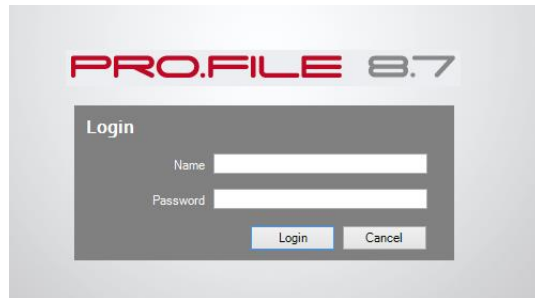
Note: No login required if "Autologin" is activated

The login is not required if the PRO.FILE autologin function is activated.

2   Opening documents from PRO.FILE

PRO.FILE manages Offices documents centrally and makes them available from the secured storage location to the user.

- If you want to open a document from PRO.FILE in Excel, you can use the function **"Open"** of the integration.

- This function "Open" starts the Checkout wizard, you can select the desired document and load it in Excel.

Note: PRO.FILE checks permissions

When a document is opened from PRO.FILE, the access permissions of the user are checked: Is the user allowed to open the document?
Is the user allowed to edit the document?

These permissions depend on the function access rights of the user and the status-dependent permissions. A document in a status "released" may probably no longer be edited.

To open Excel files from PRO.FILE, the integration PRO.FILE – Excel offers the following ways of proceeding:

- The "**Open**" function behaves as configured in the PRO.FILE Management Console via the parameter "Version load options dialog".

- The function **"Open as stored"** loads the selected document from PRO.FILE as it has been saved most recently.

- The functions **"Open with newest versions"** and **"Open with released version"** only relate to documents with linked OLE objects / graphics . In this case, it is possible to load the linked objects in specific version statuses from PRO.FILE to be displayed in the main document. (See chapter "Open with different version of linked objects")

- **"Open with version browser"** allows the opening of the document via the version browsers. With this, documents can be opened with different version statuses of linked objects/graphics in dynamic compositions.

2.1   "Open" from PRO.FILE

To open a Excel document from PRO.FILE proceed as follows:

	Function call from the PRO.FILE menu in Excel:
	Tab **"PRO.FILE"** => group **"Open"** => **"Open"**

1. Select the function "Open" from the PRO.FILE menu of the integration in Excel.

⇒ The checkout wizard for the selection of the desired document is displayed.
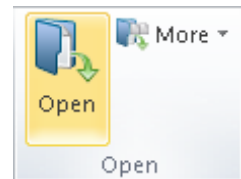
The Checkout wizard displays the PRO.FILE GUI as it was recently opened.

2. If the desired document is not yet displayed in a list or form, you can start a **search** for the document with the following functions:

   - Via the tab "Cockpit".

   - Via the search functions of the icon bar.

   - Via favorites, SmartSearch or task assignments.
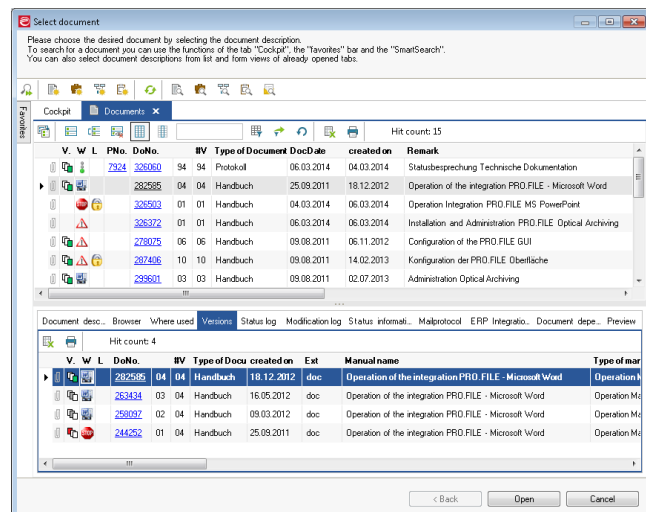
3. If the desired document is displayed in a list, **select** it (if the document is displayed in a form view, it is already selected).

4. Click **<Open>**.

5. Depending on the configuration in the PRO.FILE Management Console, a dialog for the selection of version constellations may appear. See chapter "Open with different version of linked objects"
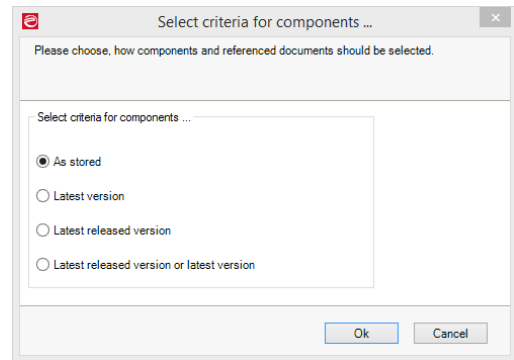
6. You then have to decide in which mode the document is to be opened from PRO.FILE in Excel. Three options are available:

- **For viewing:**
  The document is opened write-protected and cannot be modified.

- **For editing:**
  The document is locked for other users, can be modified by you and the changes can be saved back to PRO.FILE.

- **As a copy:**
  A copy of the document without PRO.FILE connection is loaded. Changes to the document can only be saved to PRO.FILE under a new document description.
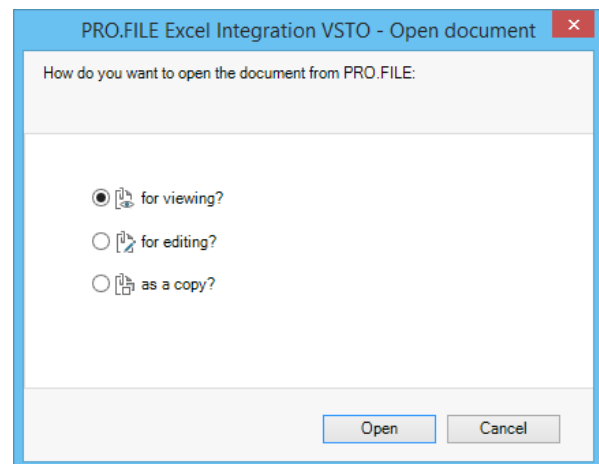
7. Confirm with <**Open**>.

⇒ The selected document is now opened in Microsoft Excel.

⇒ The opening process is thus finished.

Attention: Can I save changes to PRO.FILE or not?

It depends on the selected method for opening the document whether you can save changes to the document directly back to PRO.FILE or not.

Detailed information on the loading method can be found in the chapter "Open for viewing, editing or as a copy – what are the consequences?".

> **Note: Why can I not open a document for modifying**
>
> You want to open a document for modifying but the dialog does not offer the option "for editing"?
>
> This may have two **reasons**:
>
> - The document is locked by a different user. You can see in the status information of the document in PRO.FILE, which user has locked the document.
>
>
>
> - The document is in a status, in which you are not allowed to edit the document.
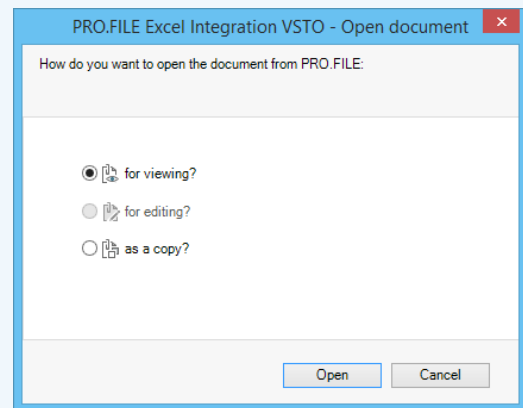
For detailed information on the opening of documents, please see the following chapters:

- [Quick selection: The PRO.FILE Checkout Wizard](#)
- [Open with different version of linked objects](#)
- [Open for viewing, editing or as a copy – what are the consequences?](#)

2.2   Open with different version of linked objects

For files with linked objects and graphics, you can specify, which version of the linked objects and graphics is to be opened. The integration menu offers the following functions:

- Open
- Open "**As stored**"
- Open "with latest versions"
- Open "with released versions"
- Open "with version browser"
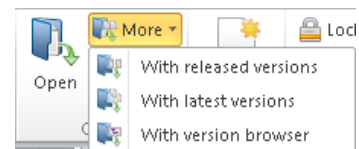
> **Note:**
>
> These options do not refer to the document selected for opening from PRO.FILE. They only relate to the objects from PRO.FILE linked within the document. This is only the case if OLE objects or graphics have been linked into the document and then saved via the integration. Via the options of the "open" function, you indicate the version of the linked objects to be loaded from PRO.FILE.

This means:

- "Open"
  The "Open" function behaves as configured in the PRO.FILE Management Console via the parameter "Version load options dialog".

- Open "As stored"
  The selected document is loaded from PRO.FILE the way it was last saved. If additional objects from PRO.FILE are linked to the document, they are loaded in the version they were last used in the document.

- Open with latest versions
  If additional objects from PRO.FILE are linked to the document, they are loaded in the newest available version.

- Open with released versions
  If additional objects from PRO.FILE are linked to the document, they are loaded with the newest available version that is in a released status.

- Open with version browser
  Via the version browser you can open documents with different version constellations of the linked objects/graphics.

	Note: Opening with version constellations is a matter of access rights!
	Each user has specific rights to see (or not to see) documents in different PRO.FILE statuses. This has effects on the opening with linked versions:
	If a user may only see documents in the status "released", the option "with latest" version will only open the newest version in a released status, even if a newer version (in a non-released status) exists.

2.2.1 Open with version browser

Via the version browser you can open documents with different version constellations of the linked objects/graphics.

	Function call from the PRO.FILE menu in Microsoft Excel
	"Tab "PRO.FILE" => group "Open" => "With version browser"

During this process, you can specify via the version browsers, which version of the document and which versions of the linked objects are to be opened.
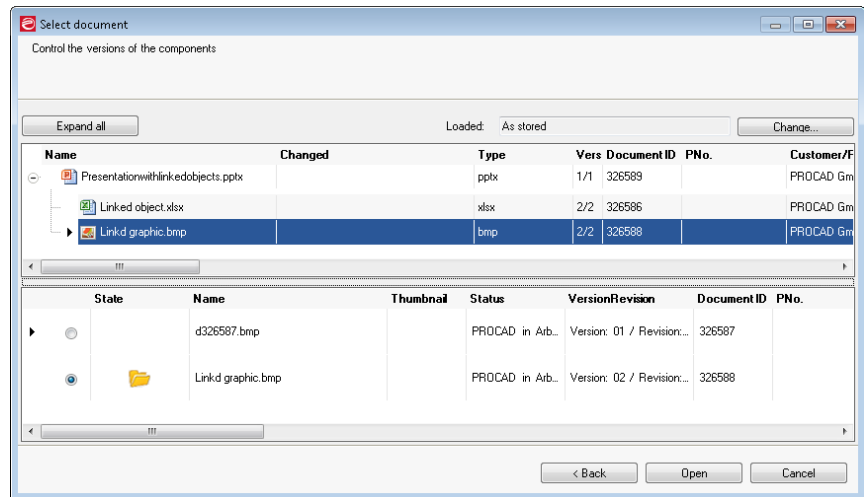
The version browser is divided in two areas

The document structure at the top

- The upper structure pane lists the main document with all linked objects/graphics.
- Via the button <Expand all> you can show the entire structure of the main document.
- The field "Loaded" shows the current opening method of the documents listed in the structure pane – without manual version choice. The opening method immediately affects the display of the structure pane:
  Via the <Change…> button you can choose among the four default opening methods:
  - Open "as stored"
  - Open "latest version" of the linked objects/graphics
  - Open "latest released version" of the linked objects/graphics
  - Open "latest released version or latest version" of the linked objects/graphics, depending on the availability.

The version pane at the bottom

- The lower pane lists the different versions of a linked object/graphic.
- Here you can select the version you want to open in your constellation.

To open a document with the version browser proceed as follows:

1. Select the tab "PRO.FILE" from the ribbon menu.
2. In the group "Open" click on "More" => "With version browser"
⇒ The Checkout Wizard opens
3. In the Checkout Wizard select the desired document and click on **<Open>**. Detailed information on the Checkout Wizard can be found in the chapter "Quick selection: The PRO.FILE Checkout Wizard".
⇒ The Checkout Wizard closes.
⇒ The window "Select document" is displayed.

4. In the document structure select the component for which you want to select a different version.

⇒ The version pane at the bottom displays the available versions.

5. By clicking the radio button in the first column you can select the desired version of the linked object/graphic:

	State	Name	Thumbnail	Status	VersionRevision	Document ID	PNo.
▶ ○		d326587.bmp		PROCAD in Arb..	Version: 01 / Revision:..	326587	
◉	📁	Linkd graphic.bmp		PROCAD in Arb..	Version: 02 / Revision:..	326588	

‹ Back   Open   Cancel
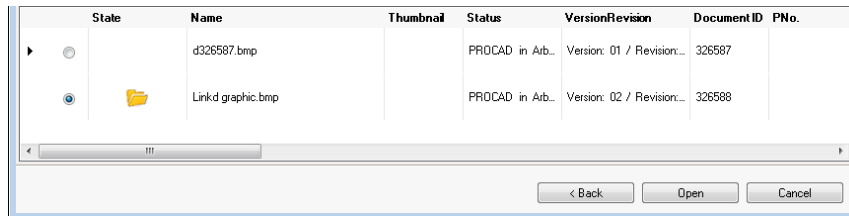
6. Once you have selected the desired version for all components, click on **<Open>** to open the document in the desired version constellation.

7. You now have to decide, in which mode you want to open the document from PRO.FILE in Excel. If you want to modify the document, you have to open it **"for editing"**.
    Further information can be found in the following chapter "[Open for viewing, editing or as a copy – what are the consequences?](#)".

PRO.FILE Excel Integration VSTO - Open document

How do you want to open the document from PRO.FILE:

◉ for viewing?
○ for editing?
○ as a copy?

Open   Cancel
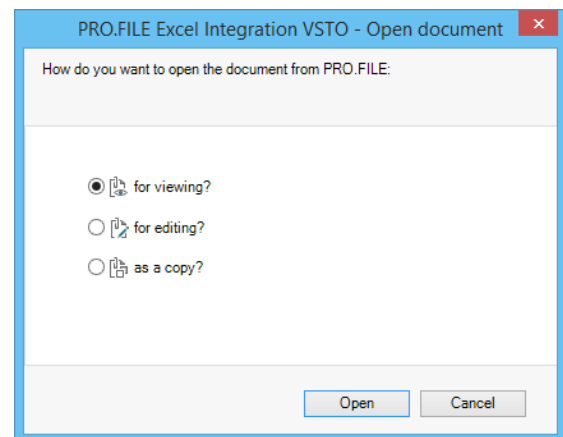
8. Confirm with **<OK>**.

⇒ The document is opened with the selected versions of linked objects/graphics. The process of opening with the version browser is thus finished.

2.2.2   Open for viewing, editing or as a copy – what are the consequences?

When openeing documents from PRO.FILE via the Checkin Wizard of the integration you have to decide, in which mode the document from PRO.FILE is to be opened in Excel. Three options are available:

- **For viewing:**
  The document

  - is not reserved (i.e. locked) for you in PRO.FILE.

  - and can thus be edited by other PRO.FILE users in the meantime.

  - is not saved back automatically to PRO.FILE after closing.
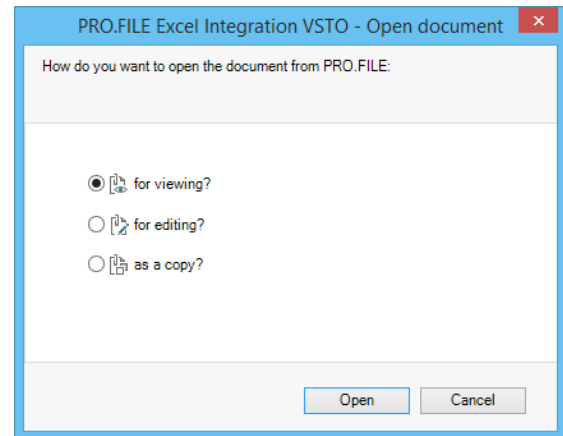
- To save changes to your document back to PRO.FILE, you have to use the function "Save" from the PRO.FILE menu. This is only possible if the document has been locked before.

- **For modifying:**
  The document

  - is locked for other users.

  - can be modified by you.

  - cannot be changed by other users in the meantime, but can be opened for viewing.

  - can be saved back to PRO.FILE upon closing with the changes made.

- **As copy:**
  The document

  - is only treated as a copy of the "original" saved in PRO.FILE.

  - has no connection to PRO.FILE and is no longer monitored by PRO.FILE.

  - is therefore not locked in PRO.FILE.

  - is not saved back to PRO.FILE after closing.

  - can only be saved to PRO.FILE as a new document.

Attention: Only changes of "locked" documents can be saved back to PRO.FILE

If a user wants to edit a document, this object has to be locked for other users at the beginning of the changes to be made in order to prevent concurring changes. This is the only way to prevent that several users are making changes to the same document at the same time. In order to change a document and be able to save the changes back to PRO.FILE you either have to

- Open the document "for editing" right from the start.

- Or lock the document after opening via the function "Reserve to change".
  For this, see chapter "Lock: From viewing to editing".

3   Saving a document to PRO.FILE

To save files from MS Excel in PRO.FILE the user can choose from the different functions:

- **"Save"**
  This function can be used for two different requirements:
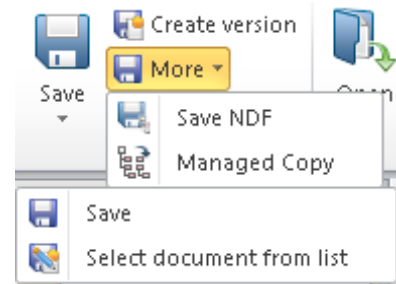
    - On the one hand, you can save new documents for the first time to PRO.FILE and create a document description. See chapter ""Save": Saving documents for the first time in PRO.FILE".

    - On the other hand, you can save changes you have made to a document, which has been opened from PRO.FILE, back to PRO.FILE. The saved status in PRO.FILE is then overwritten with the new status from Excel. See chapter ""Save": Saving a changed document back to PRO.FILE".

- **"Select document from list"**
  This function is used to save a new document to an already existing document description. See chapter "Using the PRO.FILE function "Select document from list"".

- **"Create version"**
  This function is used to create a new version of a document after changes have been made to it. Further information can be found in the chapter "Versions: Save as new version".

- **"Save NDF"**
  Via this function a neutral format document (e.g. PDF) is created from the active document and saved to PRO.FILE with a document description that is linked to the "original" document. See chapter "Save NDF".

- **"Managed Copy"**
  With Managed Copy you can duplicate documents including all objects and graphics linked from PRO.FILE. For all selected componets of the document a new document description is created in PRO.FILE. See chapter "Managed Copy".

- **Save upon closing**
  If a document has been opened from PRO.FILE and edited in Excel, the saving prompt upon closing the document is the final opportunity to save your changes. Further information can be found in chapter "Close Excel: Save and remove lock?".

Note:

The description of the saving process to PRO.FILE relates to the function **"Save"** from the menu "PRO.FILE" in MS Excel, not to the functions of the same name from the Menu "File". With the functions from the "File" menu in Excel, the file is **only** saved locally in the file system and **not** in PRO.FILE.

3.1   "Save": Saving documents for the first time in PRO.FILE

Saving files under a new document description is made with the function "Save" from the menu "PRO.FILE" '=> "Save" in Microsoft Excel.

There are two options:

- **"Save":** The Excel document is saved with a new document description in PRO.FILE if it does not already have a PRO.FILE relation.

- **"Select document from list"**: An existing document description is used to save a new Excel document in PRO.FILE, i.e. the new document is attached to an existing document description.
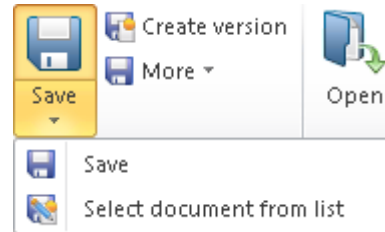
These steps are described in detail below.

3.1.1   Using the PRO.FILE function "Save"

To save a document for the first time to PRO.FILE, proceed as follows:

Function call from the PRO.FILE menu in MS Excel:

"PRO.FILE" => "Save"

1. Select the function **"Save"** from the tab "PRO.FILE" in the menu ribbon bar in Excel.
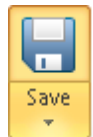
The saving of the file to PRO.FILE with the Checkin wizard is then made in two steps:

- Checkin wizard step 1: Create a new document description
- Checkin wizard step 2 optional: Assigning the created data to a PRO.FILE project

These steps are explained in the following sub-chapters.

Note: Linked objects

If other objects (graphics, OLE objects), which are not yet saved in PRO.FILE, are linked to the document to be saved, these objects are also offered for saving via the Checkin wizard.

Checkin wizard step 1: Create a new document description

If the option "Save" has been selected, a new document description is created during the saving process of the Excel document in PRO.FILE.

The document description is to classify and describe the document for further usage.

The better a document is classified, the easier it will be for other users to find the document later in PRO.FILE.

In the first step, a document description is therefore to be created.

For this purpose, the Checkin wizard is displayed:

Here, the Checkin wizard offers different options that can be accessed via the operations bar:

Create new:

Usage:
- A new document description is to be created for the new Excel document to be saved.

Proceeding:
1. Select the desired document type.
2. Fill in the form for the document description.
3. Confirm your entries with <**Next**>. The document is saved in PRO.FILE.

New using template:

Usage:
- A new document description is to be created, but an existing document description is to be used as a template.
- This way, the fields of the document form are already filled and only adjustments have to be made.
- Example: Several document descriptions for letters of similar contents but to different recipients are to be created. In order not to fill in the same data over and over again, the function "New using template" is used and only the recipient fields need to be adjusted.

Proceeding:

1. Select the option **"New using template"** in the Checkin wizard.

⇒ The Checkin wizard displays the PRO.FILE GUI as it was recently used.

2. If the document description to be used as a template is not yet displayed in a list or form view, you can use the search functions of the cockpit, the icon bar or favorites and SmartSearch to start a **search.**

3. If the desired document is displayed in a list view after the search, you can now **select** it. (If the desired document is displayed in form view, it is already selected automatically).

4. Confirm the selection of the document description with <**Next**>.

⇒ The input form for the creation of the document description is pre-filled with the data from the selected document description.

5. Make the necessary adjustments to the pre-filled data.

6. Once all required document data is entered, confirm the creation of the new document description in PRO.FILE with **<Next>.** The document is saved in PRO.FILE.

⇒ If you do not work with project assignment, the saving process is now finished. The newly saved document is opened in Excel "for modifying" and is locked for other users. You can continue editing the document.

⇒ If you are working with project assignment, this project assignment is to be made in the next window of the Checkin wizard.

- In this case continue with chapter "Checkin wizard step 2 optional: Assigning the created data to a PRO.FILE project".

Checkin wizard step 2 optional: Assigning the created data to a PRO.FILE project

In this step, the saved Excel document can be assigned to a specific project in PRO.FILE.

For this project assignment of the new document description an existing project must be selected in PRO.FILE, or a new project must be created, and then **activated.**

Note: Usage of PRO.FILE projects
This second step of the Checkin wizard is intended for the usage of PRO.FILE projects. If you do not use PRO.FILE projects: • you can skip this step with the <**Skip**> button. • the second window of the Checkin wizard is perhaps not even displayed, since the administrator may have disabled it.

Note: If several documents or linked objects are being saved. The title bar of the Checkin wizard displays the name of the object currently handled.
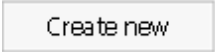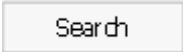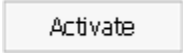
Here, too, the Checkin wizard offers different options that can be accessed via the operations bar:

Create new	Search	Select in list	Activate	Deactivate
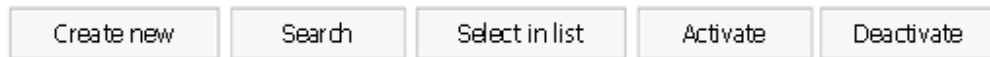
Attention: Project must be activated

In order for a Excel document to be linked to a project, this project must be ACTIVATED. This means that for all of the options, you have to select the option **"Activate"** afterwards.

The proceeding for these options is the same as for the first step of the Checkin wizard:

- **Create new:**
  A new project is created in PRO.FILE. The document description created in step 1 is assigned to this new project.

  `Create new`

- **Search:**
  The document description created in step 1 is to be assigned to an existing project. This project is now searched via the search form and selected.

  `Search`

- **Select in list:**
  The document description created in step 1 is to be assigned to an existing project. This project is already displayed in a PRO.FILE list and only has to be selected and confirmed.

  `Select in list`

- **Activate:**
  If a project is activated, all documents in PRO.FILE are automatically assigned to this project. If no project is currently activated, and you want to do so, you can use this function to activate a project.

  `Activate`

- **Deactivate**
  Again: If a project is activated, all new documents in PRO.FILE are automatically assigned to this project. If this assignment is not to be made for the current document, you can deactivate the project before finalizing the saving process.
  Note: If a project is activated, this is displayed in the title bar of the active PRO.FILE window.

  `Deactivate`

Proceeding: For the assignment of new documents to a project via the Checkin wizard proceed as follows:

1. Select an existing project or create a new one via the options displayed.

2. Select this project in the list view (projects in form view are automatically selected).

You now **must** select **"Activate"**. Only if the selected project has been activated, the assignment to the project is made after confirmation.

3.   Confirm your proceeding with **<Finish>**.

⇒   The saving of the Excel document in PRO.FILE is now finished. The newly saved document is opened in Excel "for modifying" and is locked for other users. You can continue editing the document.

3.1.2   Using the PRO.FILE function "Select document from list"

With the function "Select document from list" a new Excel document can be saved along with an existing document description.

The existing document description is assigned to the new document from MS Excel:

*   If another file is already attached to this document description, you can choose whether you want to overwrite or create a version of the existing document.

Note: Is a file attached to a document description?

Whether or not a file is already attached to a document description can be seen from the icon 📎 in the first column of the document list.

To select the document description you want to assign the Excel document to, you can use the Checkin wizard.

The aim is to select the document description the new Excel document is to be attached to.
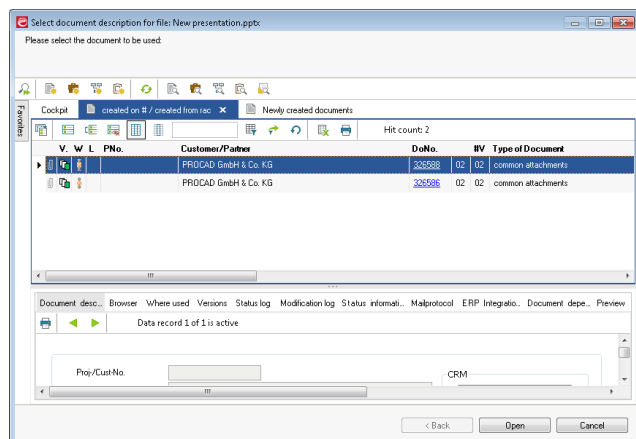
Proceed as follows:

1.   Select the function "Save" => "Select document from list" from the tab "PRO.FILE" in the menu ribbon bar in Excel.

---
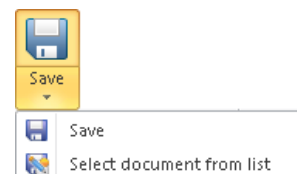
2. The Checkin wizard displays the PRO.FILE surface, as it was opened the last time you used it.
   If the desired document description is not yet displayed in a list or form view, you can use the search functions of the home page, the icon bar or favorites and SmartSearch to start a **search**.

3. If the desired document is displayed in a list view after the search, you can now **select** it. (If the desired document is displayed in form view, it is already selected automatically).

4. Confirm the selection of the document description with **<Open>**.

- **If no document is yet attached** to the document description, the new Excel document is now directly attached to this document description. The Excel document is thus saved in PRO.FILE.
  The newly saved document is opened in Excel "for modifying" and is locked for other users. You can continue editing the document.

- **If a document is already attached** to the selected document description, you now have to decide:

  - whether you want to overwrite the attached document with the new document from Excel,

  - or whether you want to create a new version of the attached document. In this case, the attached document remains available as old version of the new document from Excel.

5. Confirm your selection with **<OK>**. The new Excel document is now saved in PRO.FILE.
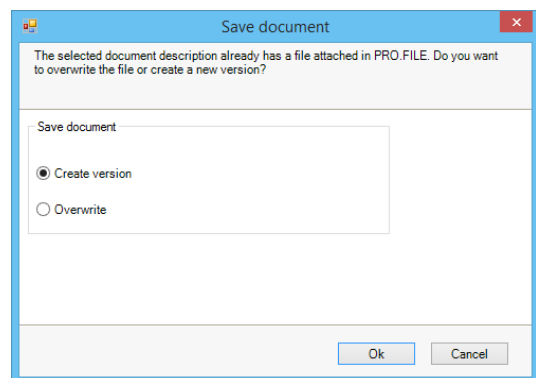
Attention – Undo not possible!

The overwriting of a file with the above method cannot be undone. The overwritten file is irretrievably lost!

Note:

For each document description only one file can be saved, since the document description is to exactly describe this document.

⇒ **If** you do not work with project assignment, the saving process is now finished.

⇒ **If** you are working with project assignment, this project assignment is to be made in the next window of the Checkin wizard.

- In this case continue with chapter "Checkin wizard step 2 optional: Assigning the created data to a PRO.FILE project".

3.2   "Save": Saving a changed document back to PRO.FILE

Via the function "Save" of the "PRO.FILE" integration menu in Excel, documents that have been opened from PRO.FILE "for editing" can be saved back to PRO.FILE.

- With this function, changes made to the Excel document are saved to PRO.FILE.
- The current state of the document in PRO.FILE is overwritten with the modified state from Excel.
- The document remains open for editing in Excel after saving.

!	**Attention: "Save" works only for documents locked "for editing"**
	The functions only saves changes to document that have been opened "for modifying" or that have been "locked" later on.
	• PRO.FILE prevents concurrent changes of different users to the same document. For this, a document is locked for all other users once it is opened **"for editing"** by you.
	• This is the only way to make sure that only the most up to data state of a document can be modified and saved back.
	A document that has been opened "for viewing" can later be "reserved to change", as described in chapter "Lock: From viewing to editing".
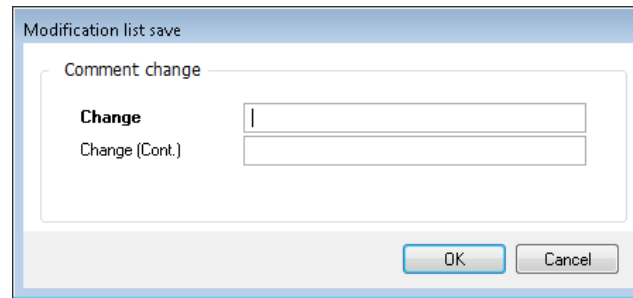
➡	**Function call from the PRO.FILE menu in MS Excel:**
	Tab **"PRO.FILE"** => group **"Save"** => **"Save"**

Proceed as follows:

1. Select the function **"Save"** => **"Save"** from the "PRO.FILE" menu in Excel.

⇒ PRO.FILE recognizes that this document already exists in PRO.FILE and has a document description.

⇒ The changes to your document are saved to PRO.FILE. The current state of the document in PRO.FILE is overwritten with the modified state from Excel.

Optional: Enter modification comment

2. Depending on the configuration and PRO.FILE status, you now have to enter a modification comment.
   Enter the comment information into the fields on the dialog screen.

3. Confirm your modification comment with **<OK>**

⇒ The modification comment screen is closed; your modification comment can now be found in the **"Modification list"** in PRO.FILE.

⇒ The saving of your changes to PRO.FILE is now finished. You can continue editing the Excel document or close it.

Note: Automatic versions

If for the document type of the document to be saved the parameter "Automatic version" is activated in the PRO.FILE Management Console, a new version will be created each time the document is saved. This happens in the background without a dialog being displayed.

The document remains open in Excel after saving – you do not need to open it again from PRO.FILE.

If you do not want to continue editing the document, you can close Excel after saving to PRO.FILE.

See also the following chapter "Close Excel: Save and remove lock?".

3.3 Versions: Save as new version

With the PRO.FILE – Excel integration it is possible to save different versions of the same document to PRO.FILE.

Note:

A new version can always be created from the most recent version (provided that status and user permissions allows this). Whether the creation of versions from older versions is allowed, depends on the parameter configuration in the PRO.FILE Management Console. If necessary, contact your system administrator.

When the function "Create version" is used, the document in Excel is saved as a new version of the original document in PRO.FILE.

- Only the document active in Excel is versioned.

- The old version of the document remains also in PRO.FILE.

- The new version is saved under a new document ID in PRO.FILE and directly displayed in Excel. The version/revision counter for this document is increased in the document description in PRO.FILE.

- The new version is opened in Excel "for modifying", i.e. you can continue working with this new version and save any changes back to PRO.FILE.

	Function call from the PRO.FILE menu in MS Excel:
	Tab "PRO.FILE" => group "Save" => "Create Version"

To create a new version, proceed as follows:

1. Select the function "Save" => "Create Version" from the "PRO.FILE" menu in Excel.

2. If did not open the newest version from the version list, but an older version instead, an information dialog is displayed first.

3. Confirm with <Yes>.

⇒ An overview is displayed of documents, for which a new version is to be created.
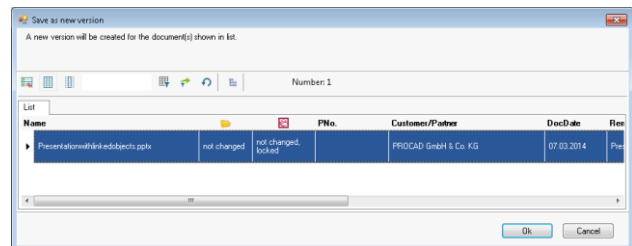
4. Confirm this list with <OK>

⇒ A new version is created of the current document in PRO.FILE.
The new version is directly displayed in Excel, and you can continue editing the document.

⇒ If OLE objects and/or graphics had been linked to the document, they are also saved in PRO.FILE and linked to the new document version.

	Attention: After the versioning, the new version is displayed
	After a document has been saved as a new version, the new version is displayed in Excel. This new version is opened "for modifying" and reserved for you. The "old" version is closed and remains in PRO.FILE.

3.4   Save NDF

The PRO.FILE integration offers the user the option to convert Office files into neutral data formats (e.g. PDF) and save them as documents in PRO.FILE. By calling the function "Save NDF", a neutral format file is created from the current document and saved to PRO.FILE.

This NDF document is then in PRO.FILE automatically attached to the document description of the original document.

	Note: Save NDF via "Format generators"
	The function "Save NDF" is configured via the configuration of the format generators. This requires corresponding installations and settings. Please contact your system administrator.

	Function call from the PRO.FILE menu in MS Excel
	Tab **"PRO.FILE"** => group **"Save"** => **"More"** => **"Save NDF"**

For the creation of the neutral format document proceed as follows:

1. You have opened a document and want to save this processing state in a neutral data format in PRO.FILE.

2. Select the tab **"PRO.FILE"**.

3. Click on **"More"** => **"Save NDF**" in the group **"Save"**.

⇒ A query, whether you want to create a neutral format, is displayed.

4. Confirm with **<Yes>.**

⇒ The neutral format is now created.

⇒ Depending on the configuration, no further interaction is required.

⇒ The created NDF document is saved automatically to PRO.FILE and linked to the document description of the original Excel document.

⇒ The creation of the neutral format document is thus finished.

3.5   Managed Copy

When duplicating documents structured with elements from PRO.FILE, Managed Copy allows the user to select specifically, which of the linked elements are also to be duplicated and which are only to be referenced.

- For each element linked in the document, you can decide whether this element is also to be copied and the duplicate to be saved in PRO.FILE.

- For all linked elements that are not duplicated, the existing references remain intact.

Managed Copy thus allows the targeted saving of documents with linked elements as new copy, as well as the changing of names of the linked elements. The user can decide which elements to save.

	Function call from the PRO.FILE menu in MS Excel
	Tab "PRO.FILE" => group "Save" => "More" => "Managed Copy"

If the function "Managed Copy" is called, all linked elements are displayed in a tree structure. The top node and the first level are expanded.
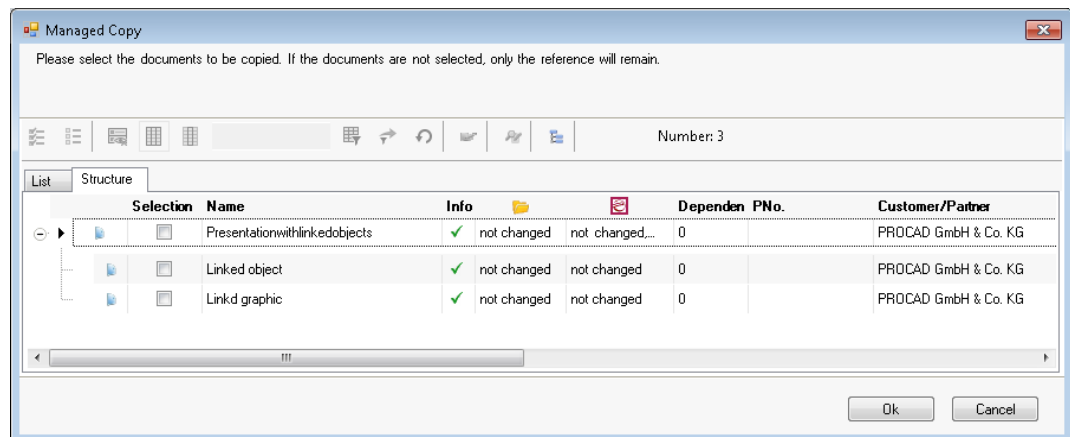
Step 1: Selection of the desired components for "Managed Copy"

The checkmark "Selection" is now to beset for all objects that are to be included in the "Managed Copy" process.

- In the column **"Selection"** select all elements to be copied.

- You can edit the file name directly in the list.

- The column "Status" shows an exclamation mark if an error has occurred. By hovering over the icon with the mouse, a tooltip is displayed.

What happens next?

If you click **<OK>**, the database relation is cut for all selected objects and the resulting local copies are saved anew in PRO.FILE. For all objects that have not been selected, only the reference is copied.

Step 2: New saving of the locally copied components in PRO.FILE

To finalize the "Managed Copy" process, you now have to create new document descriptions in PRO.FILE for all objects selected in step 1.

- The PRO.FILE Checkin Wizard is displayed for the creation of new document descriptions.

- The document information is requested for each selected object/graphic.

Information on the handling of the Checkin Wizard can be found in the previous chapter ""Save": Saving documents for the first time in PRO.FILE".

Once all copied documents are saved in PRO.FILE the "Managed Copy" process is finished.

4   "New from template" for the creation of documents

The PRO.FILE – Excel integration offers the function "New from template". This function is used to create a new document based on another document already saved in PRO.FILE.

An example:

- You want to create a new document.

- There is already a document in PRO.FILE of similar contents, which is to serve as a template.

- If you use the function "New from template" from the PRO.FILE menu in Excel to select the document to be used as a template, a new document is created with the contents of the template and saved as a new document in PRO.FILE.

The proceeding: To create a new Excel document based on a template document saved in PRO.FILE proceed as follows:

Function call from the PRO.FILE menu in MS Excel:

Tab **"PRO.FILE"** => group **"New…"** => **"New from template""**

1. Select the function "New from template" from the "PRO.FILE" menu in Excel.

⇒ The Checkout wizard is displayed to select the desired document template.
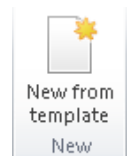
You now have to select the document that is to be used as a template for the new document you want to create in Excel.

The Checkout wizard displays the PRO.FILE surface, as it was opened the last time you used it.

2. If the desired document description is not yet displayed in a list or form view, you can use the search functions of the Cockpit page, the icon bar or favorites and SmartSearch to start a **search**.
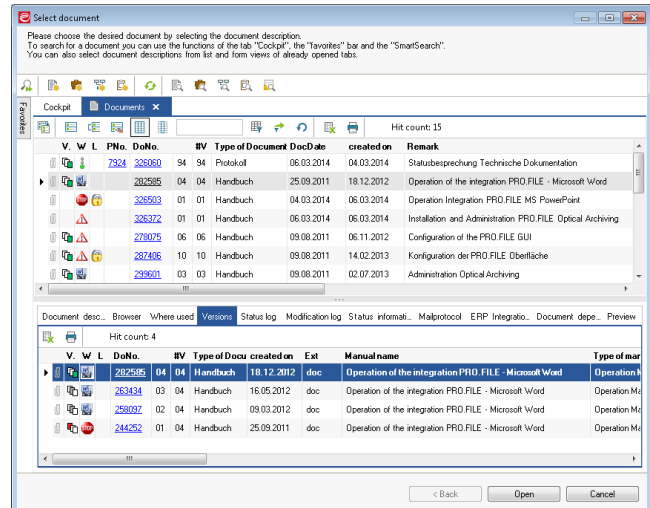
3. If the desired document is displayed in a list view after the search, you can now select it. (If the desired document is displayed in form view, it is already selected automatically).

4. Confirm the selection of the document description with <**Open**>.

Detailed information on the Checkout wizard can be found in the chapter "Quick selection: The PRO.FILE Checkout Wizard".

You now have to create the document description for the new document in PRO.FILE.

For this purpose, the Checkin wizard is displayed.

You now can enter the classification information for your new document, i.e. the document description.
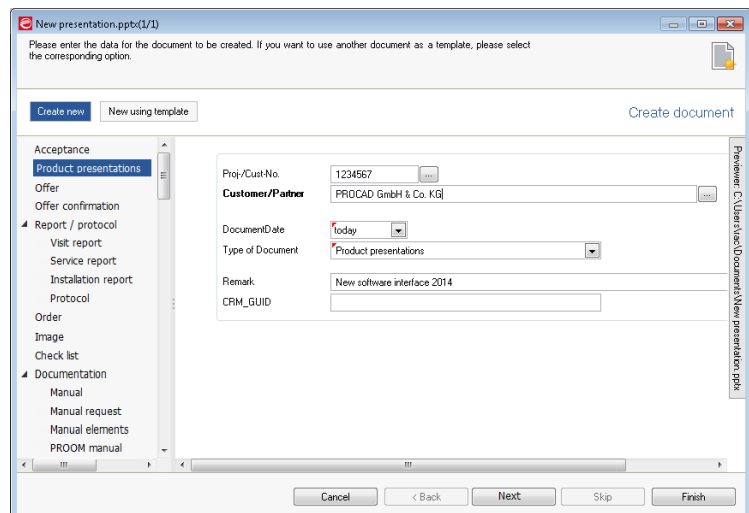
The Checkin wizard offers different functions that can be accessed via the operations bar in the window.

5. Select

    •   Either "**Create new**", to create an entirely new document description for the new Excel document.

- • Or **"New using template",** if a new document description is to be created but the data of an existing document description is to be used as template.

6. Enter the document description data into the provided fields.

7. Confirm your entries with **<Finish>.**

⇒ The new document description is saved in PRO.FILE in the start status of the document type or the user (depending on the configuration).

Detailed information on the Checkin wizard can be found in the chapter "Checkin wizard step 1: Create a new document description".

The document created via the "New from template" function is now displayed in Excel. The document is opened "for modifying" (as shown in the info pane of the integration.

The document is locked for other users. You can make the desired changes to the document.

8. Once you have finished editing the document, you can save your changes back to PRO.FILE as described in the chapter ""Save": Saving a changed document back to PRO.FILE".

9. The document is then closed in Excel and can be unlocked in PRO.FILE. See chapter "Close Excel: Save and remove lock?".

⇒ The action "New from template" is thus finished.

	Note: Clear advantage of "New from template" with PRO.FILE variables
	If PRO.FILE variables are used in Excel, their fields are automatically filled and updated when the new document is created via the function "New from template"! The variables information is directly loaded from the document description – manual adjustments are not necessary.
	Information on the creation of document templates with PRO.FILE variables can be found in the manual "Operation Integration PRO.FILE MS Word VSTO"

5   Edit: Functions regarding the PRO.FILE relation

The menu group "Edit" of the PRO.FILE menu contains different functions relating to the status and the "relation" between the Excel document from PRO.FILE and PRO.FILE itself.

- "Lock"

- "Discard changes"

- "Dissolve relation"

Detailed information on these functions can be found in the following sub-chapters.
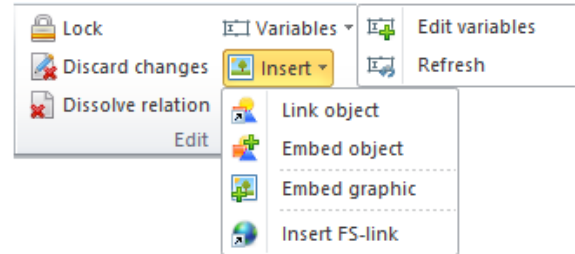
The other functions of the "Edit" group are described in the chapter "Insert PRO.FILE information as document variables".

5.1   Lock: From viewing to editing

You have opened a document from PRO.FILE for viewing, i.e. the document is not locked. Now you want to change it. In this case, you must "lock" the document.

- With the function "Lock" a document opened from PRO.FILE for viewing can be edited and subsequently be saved back to PRO.FILE.

- Whether the document in Excel is opened "for viewing" can be seen in the info pane of the integration:

PRO.FILE information			
Mode:	Opened for viewing	**Document number:**	326589

Attention: Only documents that have been locked can be saved

If a user wants to edit a document, this object has to be locked for other users at the beginning of the changes to be made in order to prevent concurring changes. This is the only way to prevent that several users are making changes to the same document at the same time.

In order to change a document and be able to save the changes back to PRO.FILE you either have to

- Open the document "for editing" right from the start.

- Or lock the document after opening via the function "Lock".

Function call from the PRO.FILE menu in MS Excel:

Tab **"PRO.FILE"** => group **"Edit"** => **"Lock"**

In order to reserve a document for modification after it has been opened for viewing proceed as follows:

1. Select the function "Edit" => "Lock" from the PRO.FILE menu in Excel.

⇒ PRO.FILE checks your permission to change the document. PRO.FILE also checks whether the document is already opened and locked by a different user.

⇒ If this check returns a positive result, i.e. the document is available for editing, it is opened "for editing" and locked for other users. The info pane will display this accordingly:

PRO.FILE information			
Mode:	Opened for editing	**Document number:**	326589

You can now make the desired changes to the document. To save your changes back to PRO.FILE, please see chapter ""Save": Saving a changed document back to PRO.FILE".

5.2 "Discard changes"

Attention: Undo not possible – risk of data loss!

The function **"Discard changes"** discards all changes to the document that have not yet been saved back to PRO.FILE. This action cannot be undone. All discarded changes are permanently lost!

With the function **"Discard changes"** you can reset the modification state of the document to the state last saved in PRO.FILE. All changes made since this last saving process are thus deleted.

Function call from the PRO.FILE menu in MS Excel:

Tab **"PRO.FILE"** => group **"Edit"** => **"Discard changes**

Proceed as follows:

1. Select the function "Edit" => "Discard changes" from the "PRO.FILE" menu in Excel.

⇒ A dialog is displayed asking you whether you really want to discard all changes and load the document anew.

> Do you want to discard the changes and open the last saved state from PRO.FILE?
> Attention:
> All currently made changes to the document will be lost.
>
> [Ja]   [Nein]

2. If this is what you want to do confirm the dialog with **<Yes>**.

⇒   The document is now opened again with the last saved state from PRO.FILE. The document is opened "for editing" and locked for other users.

You can now continue editing the document.

5.3   "Dissolve relation"

This function dissolves the connection between the active document and the corresponding PRO.FILE document description. The document thus no longer has a PRO.FILE connection and is treated as a local file.

- The document can now be changed and saved as a new document in PRO.FILE with a different name and document ID.

- The **"old"** document still exists in PRO.FILE. The function "Dissolve relation" does not delete a document or document description.
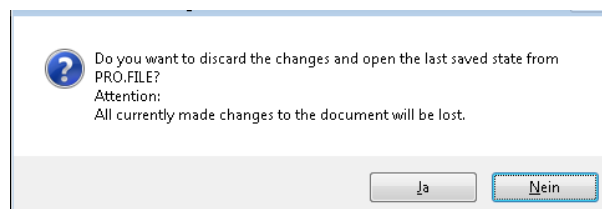
Function call from the PRO.FILE menu in MS Excel:

Tab "PRO.FILE" => group "Edit" => "Dissolve relation"

Proceed as follows:

1. Select the function "Edit" => **"Dissolve relation"** from the "PRO.FILE" menu in Excel.

2. In the wizard that is now displayed, select the components of the document to be dissolved as well.

⇒   If the document contains OLE objects or graphics from PRO.FILE, these can be disconnected as well.
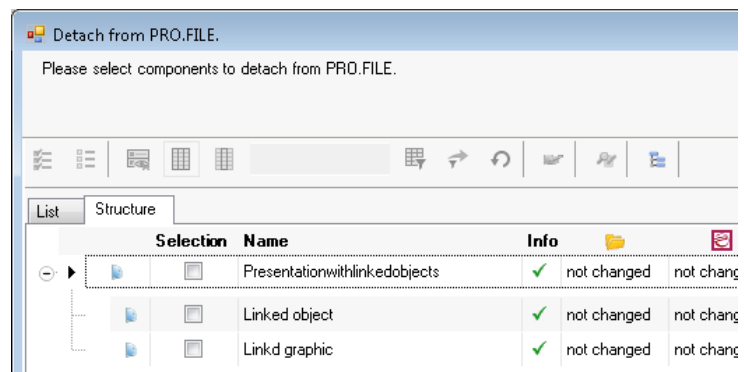
3. Confirm your selection with **<OK>**.

⇒   The document now no longer is a PRO.FILE document. Further changes are not saved back to PRO.FILE. The info pane of the integration displays this accordingly.

6 Quick inserting and linking of files and graphics from PRO.FILE

With PRO.FILE it is possible to combine documents from different sources in one document, a so-called compound document. A compound document consists of one main document and several other documents embedded in or linked to the main document.

These files and documents are called OLE objects (Object Linking and Embedding). OLE is a technology developed by Microsoft to actively import data from another program. If, for example, a Excel table is linked to a Excel document and the Excel table is changed afterwards in Excel, the displayed table in Excel changes as well.

OLE objects can be all sorts of files from the same or a different application.

When inserting an object, i.e. a graphic, a file or part of a file into the main document, you can use a linked or embedded object.

Embed or link: What is the difference?

The functions for linking and embedding differ in the location, where the data of the inserted object is saved, and the way the object is updated after insertion into the main document:

- Linked object
  Linked objects are not part of the main document, but the main document only contains a path and file name reference to which file is to be displayed at this position in the document. For a linked object, the contained information can only be modified and refreshed in the display in the main document, if the source file is edited. Linked objects are stored in the source file. The main document as target file only saves a reference to this source file and displays it. If the source file is edited, the main file will display the updated state of the source file when the main document is opened or refreshed.

- Embedded object
  By embedding an object into the main document, the object becomes part of the main document. The displayed data is saved within the main document. When the source file is modified, the displayed information in the main document is not updated.

The PRO.FILE – Excel integration allows the linking and embedding of objects that are saved in PRO.FILE or that can be saved in PRO.FILE.

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

6.1   Linking or embedding graphics and OLE objects

The integration differentiates between the linking and embedding of

- Graphics from PRO.FILE and
- OLE objects from PRO.FILE.

There are therefore 4 functions available, which can be accessed via the integration menu in Excel:

- [Link object](#)
- [Embed object](#)
- [Embed graphic](#)

Furthermore, you can insert a hyperlink to a document in PRO.FILE into your Excel document:

- [Insert FS-Link](#)
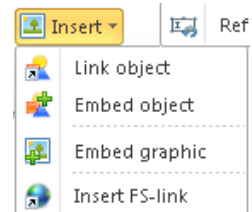
For detailed information, see the following sub-chapters.

> **Note:**
>
> To link/embed objects saved in PRO.FILE you must use the function "Link object/Link graphic" from the integration menu. If you use the Excel function for the linking of OLE objects, a new document description is created for each link when the main document is saved to PRO.FILE.

For the selection of the objects to be linked/embedded, the user is supported by the Checkout wizard.

Information on the Checkout wizard can be found in the chapter "[Quick selection: The PRO.FILE Checkout Wizard](#)".

6.2   Embed object

The embedding of objects is used to include a source file into the main document. The embedded object becomes part of the main file and PRO.FILE treats the main document with embedded objects like one document.

Changes to the source file of the object do not affect the main document and the objects embedded therein.

> **Function call from the PRO.FILE menu in MS Excel:**
>
> Tab **"PRO.FILE"** => group **"Edit"** => **"Insert"** => **"Embed object"**

Step by step: To embed an OLE object already saved in PRO.FILE proceed as follows:

1. Place the cursor at the position in the document, where you want to insert the OLE object.

2. Select the function **"Insert"** => **"Embed object"** from the "PRO.FILE" menu in Excel.

⇒ The Checkout wizard is displayed.

3. Select the document description of the desired object to be embedded. (Information on the Checkout wizard can be found in the chapter "Quick selection: The PRO.FILE Checkout Wizard".)

4. Click **<Open>**.

⇒ The selected file is now embedded into your Excel document. It has become part of the Excel document. Changes to the source file of the embedded object do not affect your Excel document.

Changes to an embedded OLE object

In order to edit the embedded object, double-click on it. Excel will automatically open the program the embedded object had been created with (source program).

You can now make changes to the embedded object. These changes only affect the object embedded in your Excel document, not the source file of the object.

6.3   Link object

The linking of OLE objects via the integration is used to link files from PRO.FILE into a main document in Excel.

Linked objects are not part of the main document. Instead, the main document contains a path and file name link to the file to be displayed at this position. For a linked object, the contained information can only be modified and refreshed in the display in the main document, if the source file is edited.

Linked objects are stored in the source file. If the source file is edited, the main file will display the updated state of the source file when the main document is opened or refreshed.

PRO.FILE administrates the main document and the linked objects as separate documents or files and supervises the link structures resulting from the usage of the link function in the integration. If the main document is opened from PRO.FILE, the linked files are loaded from PRO.FILE and displayed in the main document.

Function call from the PRO.FILE menu in MS Excel:

Tab **"PRO.FILE"** => group **"Edit"** => **"Insert"** => **"Link object"**

Step by step:	To link an OLE object that is already saved in PRO.FILE into a Excel document proceed as follows:

1. Place the cursor at the position in the document, where you want to insert the OLE object.

2. Select the function **"Insert"** => **"Link object"** from the "PRO.FILE" menu in Excel.

⇒ The Checkout wizard is displayed.

3. Select the document description of the desired object to be linked.
   (Information on the Checkout wizard can be found in the chapter "<u>Quick selection: The PRO.FILE Checkout Wizard</u>".)

4. Click **<Open>.**

The selected file is now linked at the selected position in your Excel document. The file is not part of your main document; the main document only saves the link to the source file. Changes to the source file are displayed in the main document when the main document is opened again from PRO.FILE or refreshed. PRO.FILE only memorizes and supervises the link in the document structure.

Changes to linked OLE objects	For a linked object, the contained information can only be modified and refreshed in the display in the main document, if the source file is edited in PRO.FILE.

Display of the resulting structures	The linking of files in PRO.FILE via the Excel integration creates a document structure.

To view this structure or to check the links used in a document, the following functions are available>

• In the menu of the PRO.FILE – Excel integration, the function **"Document"** => **"Document structure"**.

• At the PRO.FILE surface, the PRO.FILE function **"View"** => **"Structure."**

• At the PRO.FILE surface the dependent tabs "Browser" (view of the main document) and **"Where used"** (view of the linked document).

6.4   Embed graphic

The embedding of graphics via the integration is used to include graphic files from PRO.FILE into a main document in Excel as fixed parts of the main document. Changes to the original document have no effect on the main document and the graphic embedded therein.

Function call from the PRO.FILE menu in MS Excel:
Tab **"PRO.FILE"** => group **"Edit"** => **"Insert"** => **"Embed graphic"**

Step by step:

To embed a graphic file that is already saved in PRO.FILE into a Excel document proceed as follows:

1. Place the cursor at the position in the document, where you want to insert the graphic file.

2. Select the function **"Insert"** => **"Embed graphic"** from the "PRO.FILE" menu in Excel.

⇒   The Checkout wizard is displayed.

3. Select the document description of the desired graphic file to be embedded. (Information on the Checkout wizard can be found in the chapter "Quick selection: The PRO.FILE Checkout Wizard".)

4. Click **<Open>**.

⇒   The selected graphic file is now embedded into your Excel document. It has become part of the Excel document. Changes to the source file of the graphic do not affect your Excel document.

Changes to an embedded graphics

In order to edit the graphic, double-click on it. Excel will automatically open the program the graphic had been created with (source program).

⇒   You can now make changes to the embedded graphic. These changes only affect the graphic embedded in your Excel document, not the source file of the graphic.

6.5   Insert FS-Link

With the function "Insert FS-Link" from the menu "PRO.FILE" or the toolbar, it is possible to create a link to another document within PRO.FILE from a highlighted Excel or section of text.

If a user later opens the document and clicks on the created hyperlink, PRO.FILE opens and the linked data record is displayed.

	Function call from the PRO.FILE menu in MS Excel:
	Tab "PRO.FILE" => group "Edit" => "Insert" => "Insert FS-Link"

To insert a hyperlink to a PRO.FILE document into your Excel document proceed as follows:

1. Select the string of characters in your Excel document you want to make a hyperlink.

2. Select the function **"Insert"** => **"Insert FS-Link"** from the integration menu.

⇒   The Checkout wizard is displayed.

- Select the document description of the document to be linked. (Information on the Checkout wizard can be found in the chapter "Quick selection: The PRO.FILE Checkout Wizard".)

3. Click **<Open>.**

⇒   The desired hyperlink is created in your Excel document. By default, it is displayed in blue and underlined (default format template).

7   Insert PRO.FILE information as document variables

When working with Excel, you can insert different fields serving as placeholders for variable data. A common example is the "Page" field displaying the page number in the document.

The integration PRO.FILE – Excel enhances this functionality by the option to display data from the document description in PRO.FILE in your Excel document.

Information saved in the document description in PRO.FILE, e.g. the document ID, document type, creation date, etc., can thus be displayed in the corresponding Excel document.

Data displayed via this function from PRO.FILE are called "PRO.FILE variables".

The advantage of PRO.FILE variables:

For each document saved in PRO.FILE, a document description is created. This description contains information:

- on the document type, name of the document, document ID, language, usage, etc.
- on the status of the document, the creation date, the creator, modification date, version, workflow status, etc.

If you want to include this information in your Excel document, it is not a good idea to enter this information manually, since this would be duplicate information, which would require manual adjustments when the information in the document description changes.

With the PRO.FILE variables this update adjustment is made automatically.

- Information from PRO.FILE is inserted as fields – with or without title – into the document.
- Changes in the document description are automatically updated when the Excel document is opened again from PRO.FILE or refreshed.

All information in this image has been inserted as PRO.FILE variables. Changes to the saved status or to the classification of the document in PRO.FILE are thus automatically updated in the Excel document as well.

The functionality of PRO.FILE variables is specifically useful for the saving of document templates in PRO.FILE. If a new document, based on such a template, is saved in PRO.FILE and the corresponding document description is created, the information is updated in the new document.

Information on the usage of PRO.FILE variables can be found in the following sub-chapters:

- [How to insert PRO.FILE variables into a Excel document?](#)
- [How to update PRO.FILE variables in a document?](#)
- [How to delete PRO.FILE variables from a document?](#)

	Note: Viewer for Office documents when using PRO.FILE variables
	For the correct display of Excel documents with PRO.FILE variables, you should not use a separate viewer. A viewer does not automatically update the PRO.FILE variables upon opening, which may lead to the incorrect display of text information. In such cases, you should use Microsoft Excel for viewing Excel files.

7.1   How to insert PRO.FILE variables into a Excel document?

The integration PRO.FILE – Excel enhances this functionality by the option to display data from the document description in PRO.FILE in your Excel document as variables.

Upon each update of the document, this data is loaded directly from the PRO.FILE document description and displayed in the document.

To insert PRO.FILE variables into a document proceed as follows:

Step by step:

1. Place the cursor at the position in your Excel document where the variable is to be inserted.

2. Select the function **"Variables"** => **"Edit variables"** from the PRO.FILE menu in Excel.

	Function call from the PRO.FILE menu in MS Excel:
	Tab "PRO.FILE" => group "Edit" => "Variables" => "Edit variables"

⇒ The list for the selection of the desired information from PRO.FILE is displayed.

Here you can find all information from the document description.

The list displays the field titles as well as the corresponding data.

3. Select the document variables to be inserted into your Excel document:

- by double-clicking on the desired variable,

- by selecting several variables and the function "Add" in the menu of the variable window.

Title	Value
Document No.	326589
Type of Document	common attachments
Stored in	<@prosql@>e:\proaktedata\dat
File size	41149
Name	Presentationwithlinkedobjects.pp
Ext	pptx
created on	07.03.2014 10:13:11
created from	rac
changed on	
changed from	
Document changed...	07.03.2014
Document changed...	rac
Document deleted ...	
R.	01
Version	01
Version base Id	0326589
DocumentDate	07.03.2014
CRM_GUID	
Remark	Presentation with linked objects
Customer/Partner	PROCAD GmbH & Co. KG
Proj-/Cust-No.	
Status	PROCAD in Arbeit
FileOrgname	326589.pptx
#V	1

4. Once you have inserted all desired variables, you can close the window.

⇒ The desired PRO.FILE information is now displayed in the Excel document.

To update the PRO.FILE variables, select the function "Refresh" from the integration menu, as described in the following chapter "How to update PRO.FILE variables in a document?".

7.2   How to update PRO.FILE variables in a document?

PRO.FILE variables display information from the PRO.FILE document description in the corresponding Excel document.

If the information in the PRO.FILE document description is changed, the PRO.FILE variables in the document must be updated. The updated information is then displayed in the Excel document.

For this purpose, the function **"Refresh"** is available in the integration menu.

Function call from the PRO.FILE menu in MS Excel:

Tab "PRO.FILE" => group "Edit" => "Variables" => "Refresh"

When this function is selected, all PRO.FILE variables used in the Excel document are synchronized with the current information from the document description.

7.3　　　　How to delete PRO.FILE variables from a document?

PRO.FILE variables can be deleted manually in Excel.

Furthermore, an overview is available listing the used PRO.FILE variables according to the document sections in which they are used. If a variable occurs several times within a document, this function offers a quicker way of removing the variable from all places in the document.

To delete variables proceed as follows:

Step by step:

1. Selection the function "Edit variables" from the PRO.FILE menu in Excel.

Function call from the PRO.FILE menu in MS Excel:

Tab **"PRO.FILE"** => group **"Edit"** => **"Variables"** => **"Edit variables"**

⇒ The window for the selection of the PRO.FILE variables to be removed from the document is displayed in the right-hand pane of Excel.

2. Go to the tab **"Remove variables"**.

3. The list contains the used PRO.FILE variables according to the document sections in which they are used.
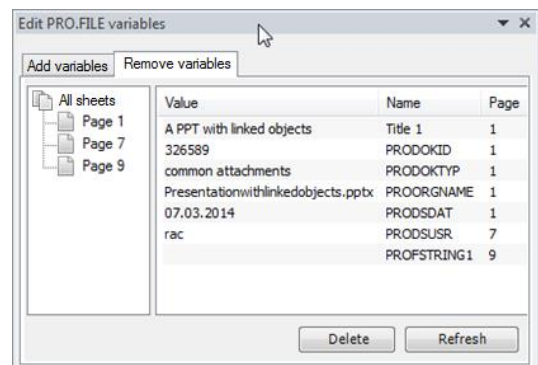
4. Select the variable you want to remove. Please **note**:
   - If you have selected "All pages" in the left-hand column, the selected variable is removed from all pages on which it occurs.
   - If you have selected a specific page, the selected variable is only removed from this page.

5. Click on **"Delete"**.

⇒ The variable is now removed.

You can now select further variables for removal. Once all desired variables are removed, you can close the variables pane.

8 "View" PRO.FILE information

The sub-menu "View" of the integration menu contains functions for displaying current information on your document in PRO.FILE.
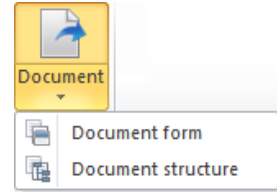
The following functions for displaying information are available:

- View "Document form"
- View "Document structure

Note: Only available after saving to PRO.FILE

Since the functions relate to information from the PRO.FILE document description, the functions of the group "View" are only available after the document has been saved to PRO.FILE. For saving a document, see chapter "Saving a document to PRO.FILE".

8.1 View "Document form"

If the current Excel document is already saved in PRO.FILE, you can use the function "Document form" to display the document description in PRO.FILE.

Function call from the PRO.FILE menu in MS Excel:

Tab "PRO.FILE" => group "View" => "Document" => "Document form"

To display the document form proceed as follows:

- Select the function "Document" => "Document form" from the PRO.FILE menu in Excel.
- ⇒ PRO.FILE opens and displays the document form of the current Excel document. (If PRO.FILE is not already started, a PRO.FILE login may be required first.)

8.2   View "Document structure"

By linking OLE objects and graphics from PRO.FILE into your document the current document obtains a structure of linked objects. To view the structure of your document in PRO.FILE, the function "Document structure" is available.

Function call from the PRO.FILE menu in MS Excel:

Tab **"PRO.FILE"** => group **"View"** => **"Document"** => **"Document structure"**

To display the document structure in PRO.FILE, proceed as follows:

- Select the function **"Document"** => **"Document structure"** from the PRO.FILE menu in Excel.

⇒ PRO.FILE opens and displays the document structure of the current Excel document. (If PRO.FILE is not already started, a PRO.FILE login may be required first.)

9   Extras, information and help

Via the section "Extras" from the PRO.FILE menu in Excel, you can access the PRO.FILE online help, current information on PROCAD, the PRO.FILE Workcenter and information on the software status of the integration.

See the following sub-chapters:
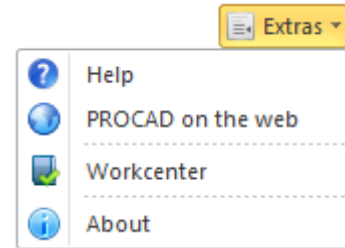
- "Help" for your PRO.FILE questions

- "PROCAD on the web"

- The "Workcenter" for file management

- "About" the configuration of the installed integration

9.1   "Help" for your PRO.FILE questions

To support you with your work with PRO.FILE and the integration, you can access the PRO.FILE online help via the integration.

> **Function call from the PRO.FILE menu in MS Excel:**
>
> Tab **"PRO.FILE"** => Group **"Extras"** => **"Extras"** => **"Help"**

When the function "Help" is selected, the PRO.FILE help is displayed in your default web browser.

- The left-hand pane displays the structure, so that you can navigate to the chapter relevant for you.

- The information of the selected chapter is displayed in the right-hand pane.
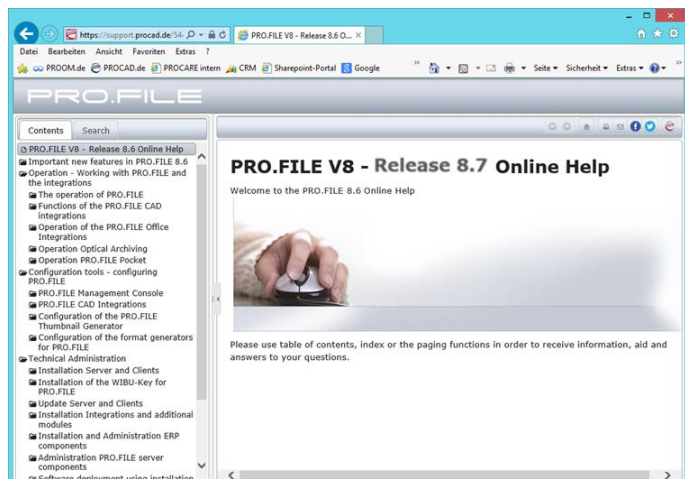
Within the help screen you can use the following functions:

[icon: back/forward arrows]	Switch back and forth between the help chapters.
Contents:	Displays the chapter structure.
Search:	Displays the entry field for a search string. The entire help will be searched for this string. The results are displayed in the left pane.
[icon: printer]	The current help chapter is sent to the printer.

Note: Access to online help – "local" or via internet

The PRO.FILE help is either installed at your computer or your company network – or is accessed via internet connection from the PROCAD server. The advantage of the latter option is that the help is always up to date.

The address bar of your web browser displays whether the file is accessed locally or via the internet.

9.2 "PROCAD on the web"

Via the menu function "PROCAD on the 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 Excel:

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

9.3 The "Workcenter" for file management

The Workcenter helps you in the administration of files and components loaded from PRO.FIL and saved locally.

Function call from the PRO.FILE menu in MS Excel:

Tab **"PRO.FILE"** => Group **"Extras"** => **"Extras"** => **"Workcenter"**

In the Workcenter you can specify a work folder for each project, display these folders in the Windows Explorer, lock and unlock components, get information on documents or delete individual documents from the work folder.
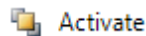
The Workcenter functions

The Workcenter is divided in two areas:

- On the left-hand side is the folder structure of the Workcenter with the corresponding functions.

- The right-hand side contains status information on the files loaded from PRO.FILE and saved locally in the Workcenter along with corresponding functions.
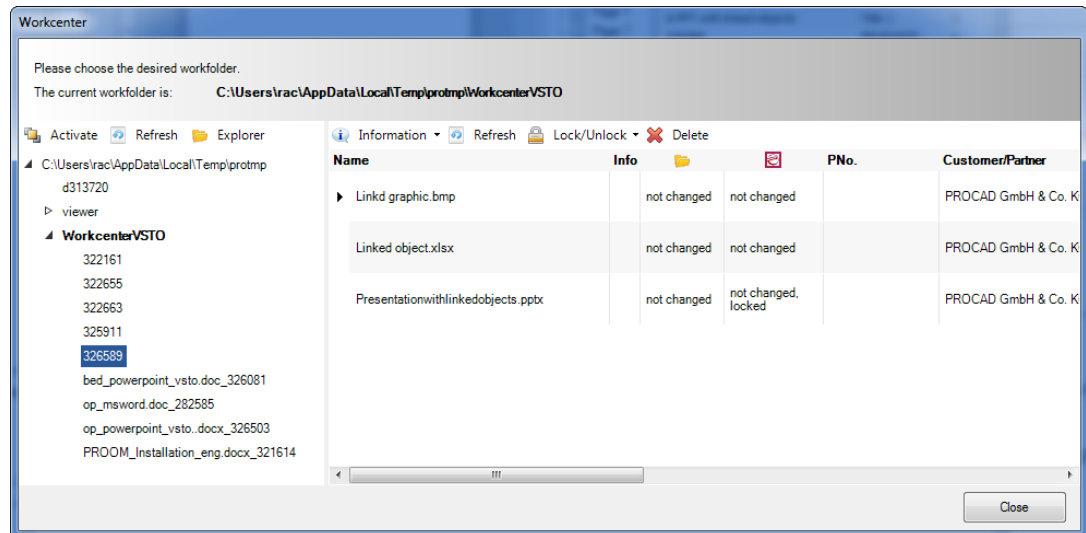
Functions for the folder structure:

Icon		Description
	Activate	The selected folder becomes the current work folder. The current workfolder is displayed in bold.
	Refresh	The folder structure view is refreshed.
	Explorer	The selected folder is opened in Windows Explorer. This gives you the possibility to delete, create or copy a workfolder via the regular Windows functions.

The functions for the work folder contents:
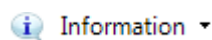
Icon		Description
	Information ▾	Via the drop-down menu you can access the following information for selected documents:

Part structure	Document structure
Part form	Document form
Part usage	Document usage
Bill of materials	

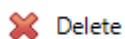| Icon		Description
	Refresh	The contents of the selected line are read anew from PRO.FILE and displayed.
	Lock/Unlock ▾	The corresponding documents is – depending on the access rights of the user – locked or unlocked.

✖ Delete	The selected documents are deleted from the folder.
	If the local status of at least one of the selected files is newer than the status saved in PRO.FILE, a warning message is displayed.
	Files from the Workcenter can also be deleted using the <**Del**> key.
📁 Clear workspace	This function will delete all files from PRO.FILE that have not been changed locally from the current work folder. Sub-folders are ignored.
▼ Filter	The display filters for the document list can be enabled via this icon. The displayed contents can be filtered for each column.
	For detailed information see the manual "Operation PRO.FILE for Beginners".
📄 Update version	Selected files from the work folder can be replaced by a newer version of the corresponding file from PRO.FILE.
Double-click on file in Workcenter folder	Double-clicking a file in the Workcenter folder will open the File in Microsoft Excel

9.4   "About" the configuration of the installed integration

For the integration PRO.FILE – Excel, your system administrator makes specific configuration settings.

To see the status of this configuration you can use the function "About" from the integration menu.

➡	Function call from the PRO.FILE menu in MS Excel:
	Tab "PRO.FILE" => Group "Extras" => "Extras" => "About"

- If an error occurs during your work with the integration, e.g. an error with the database access, this information can be helpful for your administrator.

- At the same time, you can see the database and PRO.FILE installation version you are working with. For this, the following information is displayed:

    - Installation path for PRO.FILE Client and PRO.FILE Server
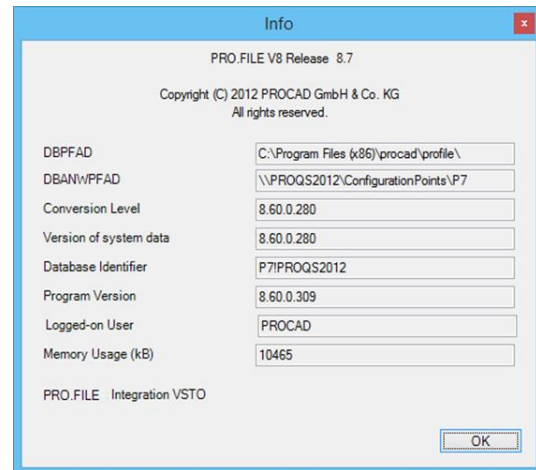
- Software status of PRO.FILE and build number of installed PRO.FILE setup

- Database system used

- Conversion status of PRO.FILE.

- PRO.FILE database ID with database name and database computer that is accessed.

- Program version, logged-in user, dictionary language and memory usage.

The information is only displayed and cannot be changed by the user.

To close the window click **<OK>.**

10   Close Excel: Save and remove lock?

Once you have finished editing a document you want to close Excel – as you are used to do. A dialog with two options is to remind you of saving and unlocking your document in PRO.FILE:

"Save changes to PRO.FILE":

You have opened a document from PRO.FILE "for editing" and you have not yet saved your changes back to PRO.FILE?

The PRO.FILE integration reminds you of saving your changes to PRO.FILE:
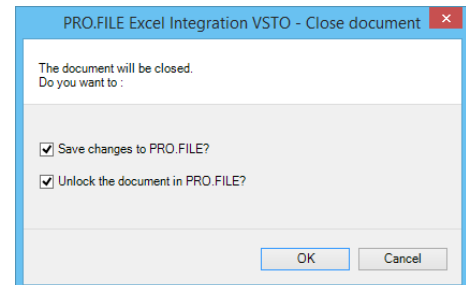
- If you activate the checkbox **"Save changes to PRO.FILE?"**, your changes will be saved back to PRO.FILE. The state of the document saved in PRO.FILE is overwritten with the current state of your document in Excel.

- If you deactivate the checkbox, your changes will be discarded. **Attention, data loss**: In this case, all changes made since the last saving to PRO.FILE are lost. The document remains in PRO.FILE in the last saved state.

- Witch **<Cancel>** you can return to editing your document in Excel.

"Unlock the document in PRO.FILE":

Documents that have been opened "for editing" are locked in PRO.FILE. Other PRO.FILE users cannot edit the document during this time.

When you close Excel and thus finish the editing of the document, the integration asks you, whether the lock is to be removed or not:

- If you activate the checkbox **"Unlock the document in PRO.FILE?"**, the document is unlocked in PRO.FILE. Other users can now also open the document "for editing".

- If you deactivate the checkbox, the document **remains locked** in PRO.FILE. Example: You want to save your changes to PRO.FILE, but you are not yet finished with your changes to the document. In order to stop other users from editing the document until you are finished with your changes, the document stays locked and thus reserved for you.

- With **<Cancel>** you can return to editing your document in Excel.

11   Functions of the Integration PRO.FILE – Excel

This chapter contains descriptions of functions of the integration PRO.FILE – Excel that are recurrently required for different actions.

11.1   Quick selection: The PRO.FILE Checkout Wizard

If you use the function "Open" from the PRO.FILE integration, you have to select the document to be opened in the Checkout wizard.

The **aim** of this procedure is:

- For PRO.FILE to know which document is to be opened, the desired document description must
    - either be selected in a list view or a structure browser
    - or be displayed in a form view
- Then the button **<Open>** at the right bottom of the Checkout wizard has to be clicked.

Prerequisite for the selection/activation of a document in PRO.FILE is that the document is displayed in a list or form view.

When the Checkout wizard is opened, the PRO.FILE GUI is displayed as it has been used the last time:

- If search results had previously been opened in a list or form view in a separate tab, you can directly access the displayed documents.
  If the desired document is displayed on a tab, select it and click **<Open>**.
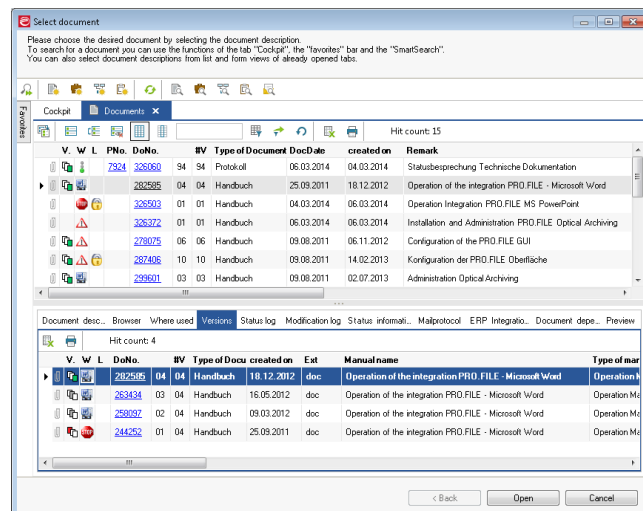
- If no search had been made previously, or if the desired document is not displayed on one of the existing tabs, you can now search for it.
  For this, several functions, which are explained in the following, are available:

!	Attention: Double-click in the Checkout wizard
	Documents are selected and then opened via the <**Open**> button. A document cannot be loaded via a double click!
	Because a double click means: Open document for viewing!
	The checkout will remain active in the background waiting for your selection. But only if the checkout wizard is closed, the document can be used for editing in MS Word.

Searching for data records in the Checkout Wizard

To search for data records in the Checkout Wizard, several options are available:

- Searching via the tab "Cockpit"
  The same icons as in the icon bar can be found on the tab "Cockpit": "Search" =>"Document", "Full-text search", "Search" => "Part", "Search" => "Project" have the same function as the icons in the icon bar.
  You can always go back to the tab "Cockpit".

- Search via the functions of the favorites bar
  The favorites bar also offers several ways of searching for a document:

  - Via the "Favorites" memorized searches or data lists can be accessed with a double click.

  - With the "SmartSearch" you can create individual search forms.

  - If you are working with PRO.FILE processes and tasks, you can access the documents linked to a task or process via the task or process structure.

Detailed information on the selection of data in PRO.FILE can be found in the manual "Operation PRO.FILE for Beginners".

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