

Quick guide

PRO.FILE 8.7 for beginners



This quick guide is to give you a brief overview of the functions of PRO.FILE 8.7. For detailed information please see the manual "Operation PRO.FILE for beginners".

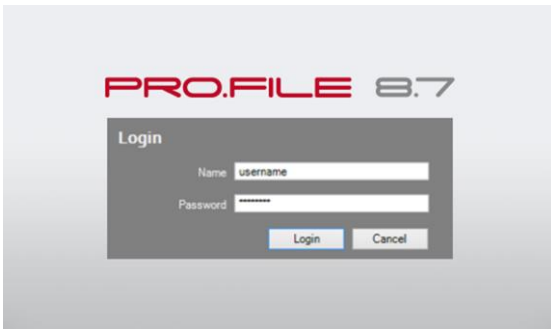
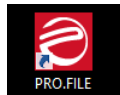
How to start PRO.FILE?

The easiest way to start PRO.FILE is by a double click on the PRO.FILE icon on your Windows desktop.

As an alternative you can open PRO.FILE via the start menu:

"Start" => "All Apps" => "PROCAD" => "PRO.FILE".

Upon start of PRO.FILE the login screen is displayed. With this login you identify yourself as PRO.FILE user.



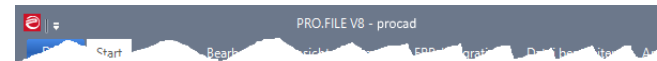
Please enter your PRO.FILE user name and password. Confirm your entries with the <Login> button. The home page of PRO.FILE is now displayed on your screen. If no login screen is displayed upon start of PRO.FILE and the start screen is displayed immediately, the AutoLogin function is activated for your computer. In this case, the login has already been made automatically via your Windows login.

The elements of the PRO.FILE window

The following elements of the PRO.FILE window are described in the following:

The title bar

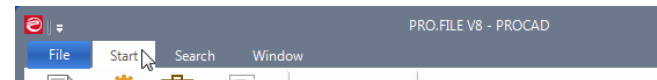
The title bar contains different information, depending on the configuration of your system:



- The name of the **logged-in user**
- Information on the **currently activated project**:
All documents and parts created are automatically assigned to the activated project.
- The **project role** of the current PRO.FILE user within the project

The register tabs

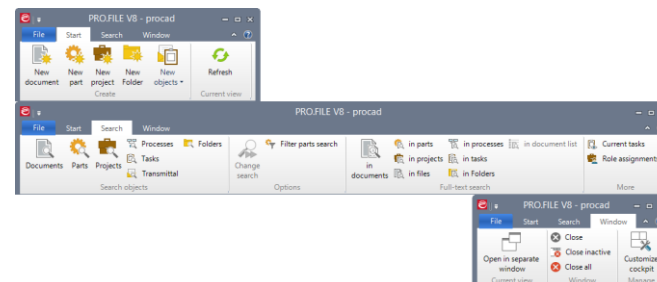
The register tabs make the necessary menus and functions therein available to you.



The menus in PRO.FILE including the available menu entries are context sensitive: PRO.FILE always displays the functions that can be applied to the currently active object. This means that for an active part different editing functions are displayed than for an active document. The menu entries can also vary depending on whether you are displaying objects in a list or in form view.

The menu ribbon of PRO.FILE

The ribbons of the selected tabs make the most important functions directly available.



- Via these icon buttons you can use the required functions with a simple mouse click.
- If the cursor is moved over an icon, a tooltip on the underlying function is displayed.

Your active objects: Main tabs

Results of a search or of a menu selection via the menu "Search" are displayed in separate tabs – either in list form, so that you can see all hits of the performed search, or in a form, so that only one data record is displayed at a time.

Additional information: Dependent tabs

The dependent tabs in the lower half of the screen display additional information on the data record, which is selected in the main tab. For a better overview, this information is divided into different categories. These can be selected individually to view the corresponding information.

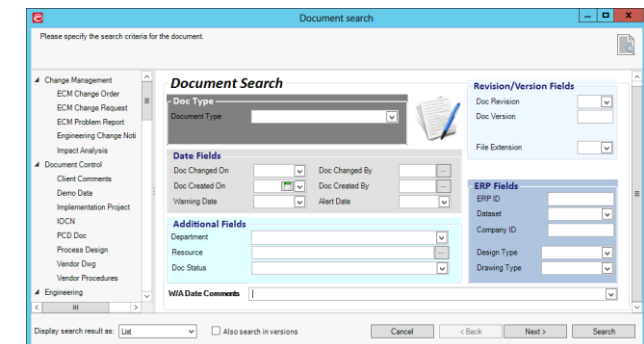
Quick access: The favorites bar

The favorites bar gives direct access to favorites, subscriptions, SmartSearches and to assigned tasks.

How to find you data in PRO.FILE

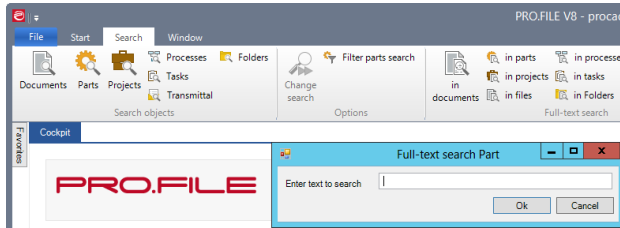
One of the basic activities when working with PRO.FILE is the accessing of already existing data records. The search for such records can be made via four functions:

- **Option 1: Via the search form**
Searching via the search form, the user can specify the search with individual search criteria.



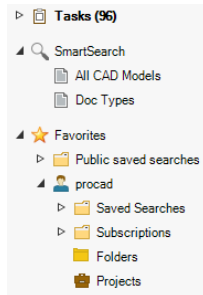
• Option 2: The full-text search

The full-text search allows the search for key words or character strings either contained in the document or part description or even in the attached file on the file server.



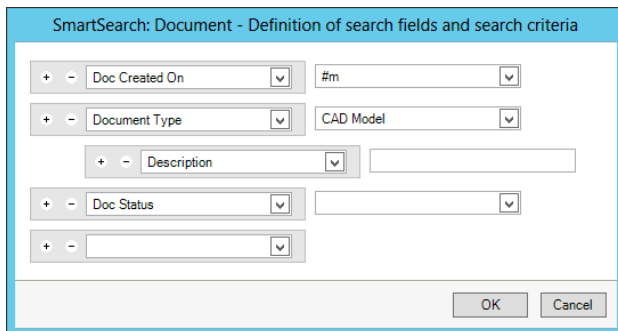
• Option 3: Favorites and subscriptions

Favorites deliver a list of results with one click of the mouse and are therefore a fast search option. You can define favorites according to your specific requirements. Subscriptions indicate changes to objects (documents, parts and projects) found by the favorite.



• Option 4: The SmartSearch


A SmartSearch is a search form that only features the desired number of fields which drastically reduces complexity. A SmartSearch will only contain those fields that the user needs for a specific search.



How do I quickly narrow down a search result?












In order to further narrow down these results and to fine-tune the search with additional criteria you can now use the "Change search" functionality that is activated via the corresponding icon, which is located in the "Search" menu:



- Clicking this  icon will reopen the selection made for the active window. This search mask will then already include the previous search criteria.
- These values do not have to be entered again but can be fine-tuned and narrowed down.
- Once the search is started these new selection criteria will now be used for the data records.




Which placeholders are supported for the search?

For entering criteria the following placeholders are possible:


-  Replaces several characters
-  Replaces one character
-  Smaller than (only for number fields)
-  Larger than (only for number fields)
-  Equal or smaller than (only for number fields)
-  Equal or larger than (only for number fields)
-  From – to
-  Exclusion of the following text
-  "Or" connection of two expressions
-  Search for empty fields
-  Search for non-empty fields

How to open Documents?

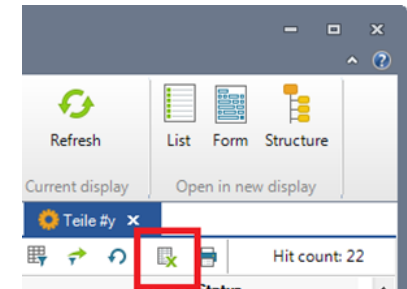
Quick access to files saved in PRO.FILE can be made via the following 3 icons:

-  **Display:**
If a file is saved along with a document description, this file can be opened for viewing with this icon. Changes cannot be made to the document.
-  **Edit:**
A file that is saved along with a document description can be opened for editing with this icon. With the according access permissions you can save changes to the file back to PRO.FILE.
-  **Open copy:**
A file that is saved along with a document description can be opened as a copy with this icon. The original file in PRO.FILE remains unchanged. Changes are not automatically saved back to PRO.FILE

Export of list and browser contents to Excel

Via the  icon it is possible to export the contents of a displayed list or browser view into an Excel file.

This export to Excel can be made from the main tab as well as from the dependent tabs.



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Quick guides for operation manuals

To make the usage of PRO.FILE and its modules as easy as possible, the basic functions of the module are explained in this leaflet.

- If you want to use this guide as a pamphlet, you can print it double-sided (duplex: Flip on Short Edge) and fold the sheet along the dotted lines, so that page "1" faces upwards (see image below).
- Alternatively you can use the sheet without folding, e.g. as laminated desktop pad.

