

Quick guide

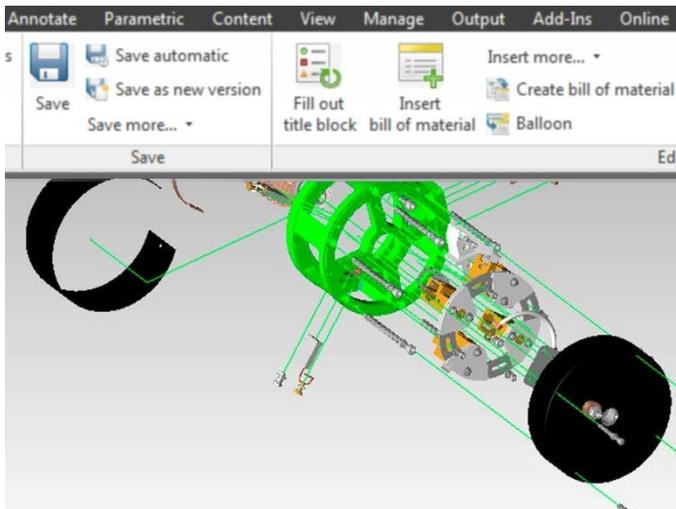
PRO.FILE 8.4
Integration AutoCAD



This introduction is to give you an overview of the integration functions. For detailed information please read the operation manual.

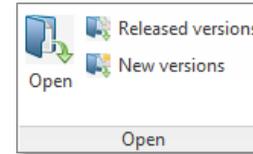
Function overview

Via the menu "PRO.FILE" the user can directly access the PRO.FILE functions for document management from AutoCAD. This menu offers the functions listed below.



Functions for opening CAD objects

- **Open:**
This function opens PRO.FILE and prompts the user to select a CAD document for loading in AutoCAD.
- **Open with released versions**
The selected document is opened from PRO.FILE. If other CAD documents from PRO.FILE are linked to this document, the newest released versions of these CAD components are loaded.
- **Open with newest versions:**
The selected document is opened from PRO.FILE. If other CAD documents are linked to this document, the newest versions of these CAD components are loaded.



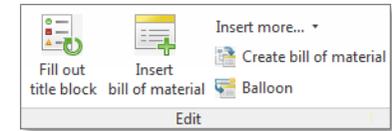
Saving functions

- **Save:**
Via this function newly created CAD documents are checked in to PRO.FILE, or documents already saved in PRO.FILE and checked out for editing are saved back to PRO.FILE.
- **Save automatic:**
Document and part descriptions for all components are created in PRO.FILE automatically without query. File names and properties can be configured to be transferred automatically into specific PRO.FILE fields.
- **Save as new version:**
Saves the currently active CAD document as a new version in PRO.FILE.
- **Save NDF:**
With this function, a **neutral data format** (e.g. tiff, pdf) is created from the CAD drawing and saved as new document in PRO.FILE. This NDF document is automatically linked to the part master record of the drawing.
- **Save as Xref:**
Saves the currently active CAD document as Xref in PRO.FILE.



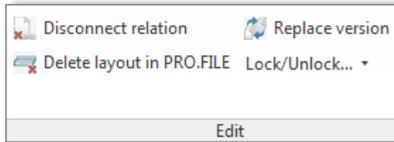
Functions for editing CAD objects

- **Save as block:**
Saves a block in PRO.FILE.
- **Version structure:**
When this function is used, all structure elements, starting from the top element are versioned and switched to the new version.
- **Fill out title block:**
Via this function you can fill out the bill of materials, modification list and title block of a drawing with a single click. The prerequisite for this is that these lists and fields are already configured for the used template.
- **Insert bill of materials:**
If you want to display a bill of materials created in PRO.FILE on your CAD drawing, you can use this function to insert and place it.
- **Insert more ...:**
In this sub-menu you find the following functions to insert AutoCAD elements from PRO.FILE into the current CAD document:
 - **Insert Xref (M1:1)**
 - **Insert Xref (other scale)**
 - **Reload Xref**
 - **Insert Block (M1:1)**
 - **Insert Block (other scale)**
 - **Insert raster image**
- **Create bill of materials:**
This function creates a bill of materials, based on the current CAD structure, and saves it to PRO.FILE. If a bill of materials exists already, it is updated.
- **Balloon:**
With this function you can place position numbers (balloons) on your CAD drawing. The balloons refer to entries in the PRO.FILE bill of materials.



- **Disconnect relation:**

This function deletes the database relation of a drawing, part or assembly (including a selection of contained parts) to PRO.FILE. The CAD objects are then treated as a locally saved CAD document and no longer have a PRO.FILE relation.



- **Delete layout in PRO.FILE:**

If layouts are saved in PRO.FILE for an AutoCAD model, these layouts can be deleted from PRO.FILE.

- **Replace version:**

This function allows to replace a version of a CAD part in all assemblies, in which it is used, with a newer version.

- **Lock:**

CAD documents loaded from PRO.FILE in AutoCAD are not automatically locked for other users. If you want to edit a CAD document, you have to use the command "Lock" before making the changes. This prevents the document from being changed by a different user in the meantime.

- **Unlock:**

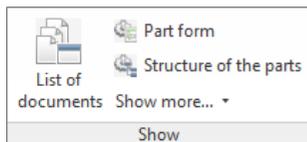
With this function CAD documents, which were locked for editing in AutoCAD, can be unlocked. Other users can now also edit the object. Please note that changes to an unlocked object are not automatically saved to PRO.FILE, but that the saving process has to be carried out explicitly.

Information and display functions

The sub-menu "Show" offers different functions for the display of PRO.FILE information on the active CAD document:

- **List of documents:**

This function opens the special documents list and displays the configured information on the current part, the drawing or the assembly, including all linked objects.



- **Part form:**

Switches to PRO.FILE and displays the description form for the active part.

- **Structure of the parts:**

Switches to PRO.FILE and displays the structure overview for the active part.

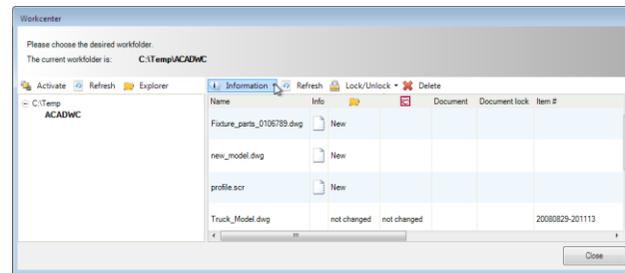
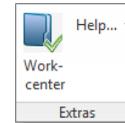
- **Show more:**

Each of these functions opens PRO.FILE and displays either the **part usage**, the **bill of materials**, the **part position**, the **documents structure**, the **document form**, the **document usage** or **all document versions** for the active part.

Extras

- **Workcenter:**

All files loaded or saved via the PRO.FILE integration in AutoCAD are automatically saved locally in the Workcenter folder. With this function you can select this local work folder. If several sub-folders are configured in this work folder, you can "activate" the sub-folder to be used.



- **Help:**

This function opens the PRO.FILE online help.

Saving CAD data to PRO.FILE

Via the function "Save" you can save parts, assemblies and drawings you have created in AutoCAD to the PRO.FILE database.

- First, you have to save your newly created objects locally. After that, you can save the objects to PRO.FILE. To do so, activate the PRO.FILE menu in the menu bar and select the function "Save".

The **Checkin Wizard** is displayed. In the first step, the assignment of the CAD documents to be saved to a PRO.FILE part master rec-

ord has to be made. The wizard offers different functions:



Create new: A new part master record is to be created for the new document.

Select in list / Search: The document to be saved is not to be linked to a new part master record, but to an existing part master record.

New using template: A new part master record is to be created for the new document. An existing part master record is to be used as template for the new one.

- Once you have made the desired entries for the classification of the part, confirm the saving of the part master record with **<Next>**.

In the second step, the document description is created. Here too, the Checkin Wizard offers different functions:



Usage of and proceeding for these options is identical to the usage and proceeding of the options for the part master record, with the difference that the options here refer to the document description.

- Once you have made the desired entries for the classification of the document, confirm the saving of the document description with **<Next>**, if you also want to make a project assignment, otherwise with **<Finish>**.
- If you also want to make an assignment to a project, the third part of the Checkin Wizard is displayed. Here you can select or, if required, create a project. In order for the new CAD documents to be assigned to the selected Project, you need to use the option "Activate" before finalizing the wizard screen.

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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.

