

Quick guide

# PRO.FILE 8.5 Project Manager



This quick guide is to give you a short overview of the possibilities and procedures for the usage of PRO.FILE projects and of the flexible rights administration for projects via role concepts. For detailed information please see the operation manual "Operation PRO.FILE Projects and Roles".

## Basic information

Projects are used to describe a substantial task or goal seeking accomplishment within an organization. Over the lifetime of a project, users will create and manage documents and parts that directly relate to the projects.

The PRO.FILE object type "Project" allows for a task-oriented or project-based document management, enabling users to create actual projects and assign documents and parts to them.

Projects can be hierarchically structured. This allows for a combination of several sub-projects into a major project.

There is the possibility of enhancing the structure of projects by tasks. This adds a time component to the project – the project is finished when all tasks are completed.

The project management in PRO.FILE is accompanied by the concept of roles. Applying the concept of roles to a project means that a unique and project-specific project role can be assigned to each user. The project role describes for which actions a user is authorized within a particular project (regardless of what his/her rights are in other projects).

## Working with projects

PRO.FILE projects are basically used to collect information, data, part and document descriptions and to structure them project-specifically. It is also possible to link other projects as "sub-projects" to a project.

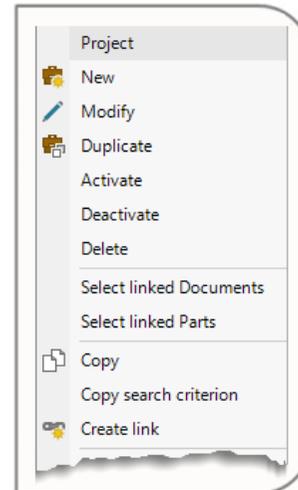
The PRO.FILE status administration also applies for projects: After a project has been created it is in a specified start status and can be transferred from there into other statuses (e.g. "In progress", "Verification", "Released"). As long as the role concept is not used, the defined status-dependent permissions and function access rights apply for the project and attached objects.

### The functions for project management

Functions for interacting with projects can be found in the "Edit" menu. This menu is available when projects are displayed in form or list view by right-clicking the project with the mouse.

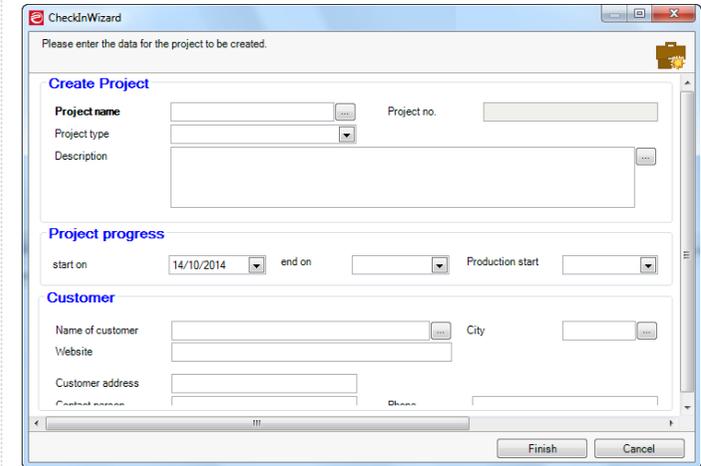
The specific project functions include:

- "New" – Create new projects
- "Modify" the project description
- "Duplicate" a project description
- "Activate" and "De-activate" – new parts and documents are automatically assigned (linked) to the activated project
- "Delete" a project description
- "Select linked documents" and "Select linked parts" – find objects linked to the project
- "Copy" and "Create Link" for the linking of the project to other objects.



### How to create new projects?

The menu function of the PRO.FILE menu bar "File" => "New" => "Project" (or via the above menu "Edit" if another project is already selected) opens the Checkin wizard for the creation of a new project description



Enter all information required to properly classify the project and click <Finish>. The new project is now displayed on a new tab in PRO.FILE.

### Modify the project description

The function to modify a project description depends on the status of the project and the permissions of the user and the project roles. Projects that are e.g. in a status "Released" or "Finished" can usually no longer be changed.

### Duplicate projects and project structures

With this function it is possible to create a new project as copy of an already existing project. Existing properties are directly copied into the new project. Role assignments are copied as well when a project is duplicated and do not need to be made again. The project managers are not copied – instead, the creator (i.e. the user who copied the project) is entered as project manager.

The function "Duplicate" copies sub-projects and documents/parts directly linked to the project into the new project.

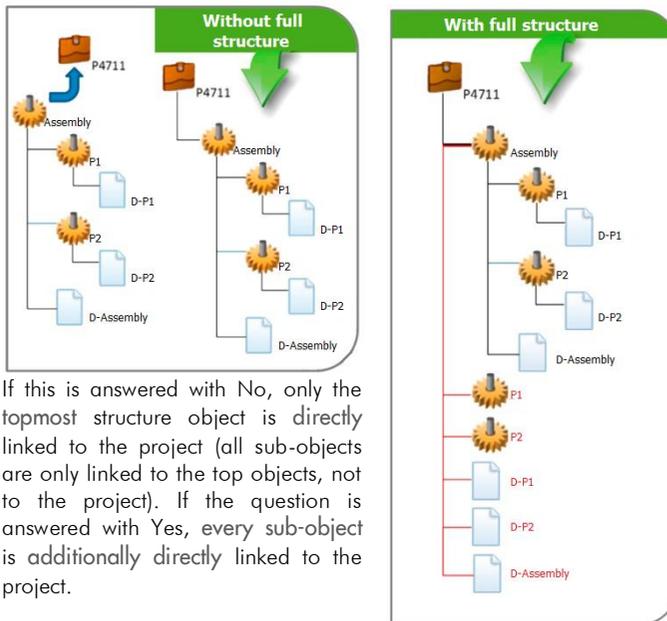
### Delete a project

The delete command removes a project from the database. However, attached parts, documents and sub-projects will not be deleted. They only will lose their assignment to the project. The ability to delete depends on the project role assigned to the user within the project and the function access rights of the user.

## Link PRO.FILE objects with projects

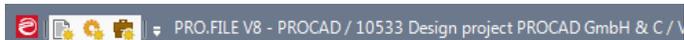
Via the structure overview you can view and manage the connections between projects and other data objects. The function "Keep in memory" puts the selected project into the PRO.FILE clipboard. In order to link this project to a different project you can then select the other project and select the function "Link".

If a structured object is to be linked to a project, a question will appear, asking whether the complete structure should be linked to the project.



If this is answered with No, only the topmost structure object is directly linked to the project (all sub-objects are only linked to the top objects, not to the project). If the question is answered with Yes, every sub-object is additionally directly linked to the project.

There is also a function to delete a link. This function only deletes the link between the two objects, not any of the objects themselves. To make the assignment of documents and parts to a project easier and to allow for an automation of this process, a project can be "activated" in PRO.FILE. When a project is activated, each new part or document is automatically assigned (i.e. linked) upon its creation to the project. The currently activated project is displayed in the PRO.FILE title bar.



## Select linked documents or parts

With the functions "Select linked documents" and "Select linked parts" the general search can be narrowed down – to the documents or parts that are linked to the selected project. When one of these functions is selected, the usual search form is displayed, in which you can enter search criteria. The list of results matching these criteria, however, is limited to documents / parts linked to the selected project.

## Strong and weak links

The project management of PRO.FILE allows assigning a document or part to several projects. In such cases, PRO.FILE distinguishes two types of links: strong and weak links. The type of link determines access rights to the document or part. The strong link describes the first assignment of a document or part to a project. Access rights to the document or part are determined by roles assigned to this project "1". If the part/document is linked to another project "2", the access rights specified via the role assignment for project "1" still apply. If an object is linked to a project via such a weak link, this additional link is indicated

by a corresponding icon in the structure browser: If required, the link type can be changed – provided that the user has the corresponding access rights – to give the strong link to a different project. Such a change will, of course, affect the access permissions to the linked object, depending on the role assignments within the project that now has the strong link.

## The concept of project roles in PRO.FILE

Basically, project roles define the functions and rights that can be exercised by persons or user groups within a project. It is thus possible to attach permissions to project roles and to define them project-specifically. If a user is assigned a project role within a project, the permissions defined for this project role are transferred to this user. Outside the project, the regular function access rights and status-dependent permissions defined for the user apply.

Only the project manager is entitled to make role assignments. The creator of the projects is the first project manager. A project manager may assign further project managers.

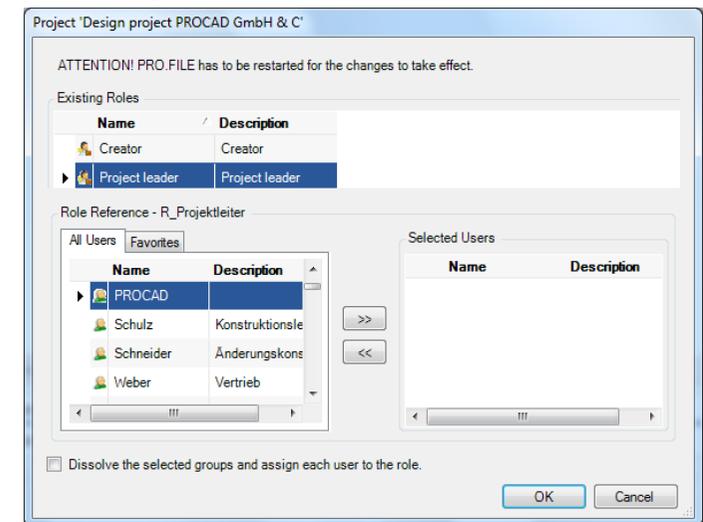
A project role can be assigned to a user or group. The assignment of the actual permissions to a role is made in the PRO.FILE Management Console. Please contact your responsible PRO.FILE administrator for further details.

For users without a specific project role, it is possible to specify a general project guest role. Via this guest role you can define general access permissions for project-external users.

## Assignment of a project manager and of project roles

To assign a project manager select the project in PRO.FILE for which you want to assign a project manager. Go to the dependent tab "Project manager". Click on the icon "Create new project manager" to open a selection window. Here you can select the user you want to make project manager.

In order to assign a role to a user or group go to the dependent tab "Role assignment". Click on the icon "Manage the role references" to open the assignment window.



Select the role that you want to assign to a user or group from the upper area. Select the users or groups which you want to assign the role to from the lower area. Then click on . If you want to assign further roles, select this other role and proceed in the same way as before. A user can be assigned to several roles within a project, either directly or via a group. The user then gets the sum of all rights from the different roles. Once you are finished with your role assignments, click <OK> to exit the window.

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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.

