

Documents

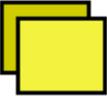
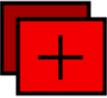
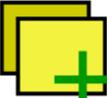
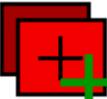
Document status

Documents are in certain states in which authorised user groups can perform actions on them, with read or write access. This is shown in the document display by a corresponding symbol.

Symbol	Status	Meaning
	View only	The document can only be opened for viewing.
	Locked	The document cannot be edited or viewed.
	Created	The document is created and can be taken out for editing.
	Filed	The document is filed and can be taken for editing.
	In progress	The document is in progress. The editing user is also displayed.
	Released	The document is released.
	Waiting for review	The document is filed and must be reviewed by the responsible user.
	Checked	The document has been checked and must be released by the responsible user.
	Item master in progress	The properties of the document are currently being edited.
	Parts list in progress	The parts list is in progress.
	Link	There is a link for the document.

Symbol	Status	Meaning
	In progress by current user	The document is in progress by the current user.

Additional information about the document

Symbol	Meaning
	The document contains appendices
	The document is a variant part
	The document is a variant assembly
	The document is a flexible built-in part/assembly
	The document is a variant part with appendix parts
	The document is a variant assembly with appendix parts
	The document is a flexible part/assembly with appendix parts
	The last release of the document has been withdrawn and the document is waiting for a new release.
	The entry is a link to a document.
	Additional notes exist for the document.
	Redlinings exist for the document.
	The document must be synchronised.

Document list

The document list shows all documents in the currently selected folder.

Dokumente									
	Dokument-Nr.	Benennung 1	Benennung 2	Typ	Status	Datum	Anwender	LIEFERANT	
	<all>	<all>	<all>	<all>	<all>	<all>	<all>	<all>	
	201501-B08-001	BGR		Baugruppe	Freigegeben	12.02.2018 10:21:22	admin		
	201501-E08-001	Profil	unten	Einzelteil	Freigegeben	12.02.2018 10:32:54	admin		

Selecting a document in the list displays the document properties.

▶ CAD ▶ 201501 ▶ Konstruktion ▶ 03 : Grundaufbau

The title bar of the document list shows the currently selected folder path. Click on a folder path name to switch to the corresponding folder above it.

If you press the middle mouse button, a tooltip window with further document properties is displayed.

	Dokument-Nr.	Benennung 1	Bene...	Typ	Status
	<all>	<all>	<all>	<all>	<all>
	201402-B00-001	Grundaufbau		Baugruppe	Abgelegt
	201402-E00-001	Grundplatte		Einzelteil	Abgelegt

201402-E00-001

Dokument-Nr: 201402-E00-001
 Benennung1 : Grundplatte
 Benennung2 :
 Benennung3 :
 Material:
 Lieferant:
 Kommentar:

Menu options:

	Properties	Opens the item master mask to edit or view the document properties.
	New	Creates a new document.
	Copy	Copies the selected document.

	Delete	Deletes the selected documents.
	View	Displays the document in the viewer.
	Open	Takes the document in work (check out) and opens the document file in the corresponding application for editing. The status of the document is „In work“.
	Open Drawing	Takes the document in work and opens the drawing file in the corresponding application for editing.
	Open with selection	You can select the document file to open.
	Undo	Undoes the last work in progress.
	Store	Stores (checks in) the document. Other users can access the document again. The status of the document is „filed“.
	Release	Sets the status of the document to „Released“.
	Take back release	The last release is taken back. The document is given the status „In progress“.
	Cancel release	Cancel the release. The document is then given the status „In progress“.
	Partial use	Displays the partial use of the document.
	Go to storage folder	Navigates to the storage folder of the selected document.
	Go to „Replaced by“	Navigates to the document that is defined as a replacement document.
	Refresh	Refreshes the current document list.

Document List Tabs

By default, a document list exists to display the documents that are in the selected folder or result from the search.

Tabs allow quick switching between several different document lists.

Dokument-Nr.	Benennung 1	Benennung 2	Typ	Status	Datum	Anwender
201403-E00-001	Platte	Test	Einzelteil	Geprüft	09.03.2021 09:13:10	mac
201403-E00-002	Abdeckung		Einzelteil	Freigegeben	09.03.2021 08:54:19	mac

The active tab receives new content when a new folder is selected in the structure.

A tab therefore retains its content until a new folder is selected in the structure.

Context menu for controlling the tabs

Right-clicking on a tab opens a context menu:



New tab	Ctrl+T	Creates a new empty tab and activates it.
Close this tab	Ctrl+W	Closes the active tab. The previous tab is activated.
Close all tabs	Ctrl+Shift+W	Closes all tabs except the first tab.
Go to...		Synchronises the navigation structure with the active tab. If the configuration parameter [structure.synctoactivetab] is activated, the corresponding parent element in the structure is automatically selected when switching between tabs.

To activate a tab, click on the tab with the mouse.

Clicking on a tab with the middle mouse button also closes it.

The first tab cannot be closed.

The name of a tab always corresponds to the current parent element except for the first tab.

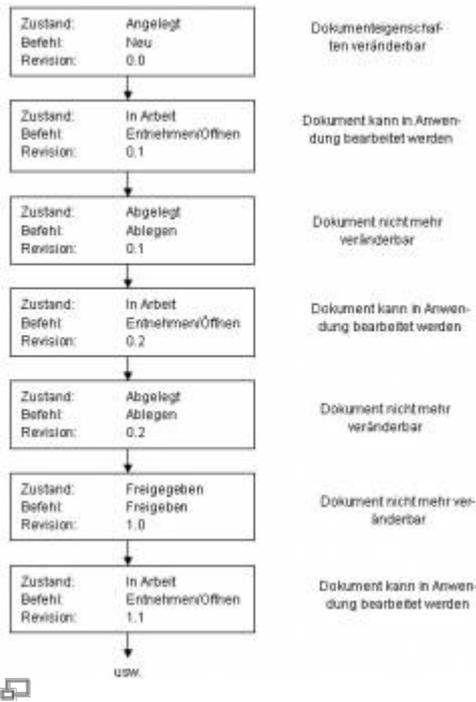
When the mouse pointer hovers over a tab, a tooltip shows the current folder path.

Quickly create a new tab

By holding down the Shift key for all functions that result in a new content in the document list, a new tab is automatically created with the result. These are e.g.:

- Click on a folder
- Direct search
- Part Usage > Search Results
- Go to storage folder
- Parts list > Show articles / Show all articles

Document versions



Documents with versioning typically go through the following states:

Document files can only be changed when they have the status „In progress“. The document properties can be changed at any time except for released documents. A new version is created automatically.

If a user takes a document „In work“, no other user has access to the document. After a stored document is released, its revision number also increases. The change status of a document is made up of the revision and version number.

Ex.: Revision 3.6 = 6th version derived from the 3rd revision

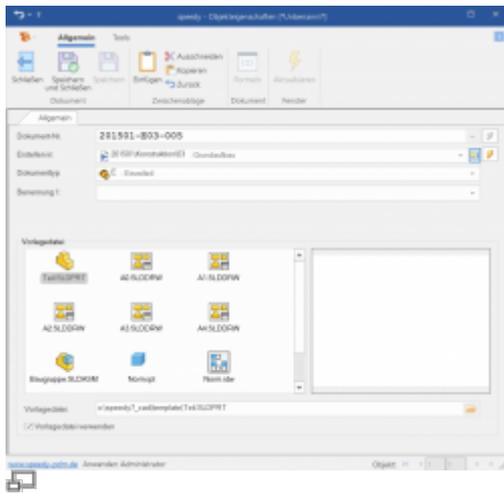
Create new document

Ribbon: Document „ New {[Ctrl]+[N]}

Context menu: Document list “ New

Toolbox: New

Before a new document can be created, the project folder must be selected.



Document number

Displays the new document number. The document number is automatically assigned by the system. Depending on the configuration, a „speaking“ or classifying number can be created here. The document number is unique throughout the system.

Create in

Defines the folder where the new document will be stored. A folder must be selected.

Document type

Defines the document type of the new document. A document type must be selected. Depending on the configuration, the document type is already predefined with the selection of a folder.

Naming1/Naming2

Define a title for the new document. The title is used in conjunction with the document number to generate the file name.

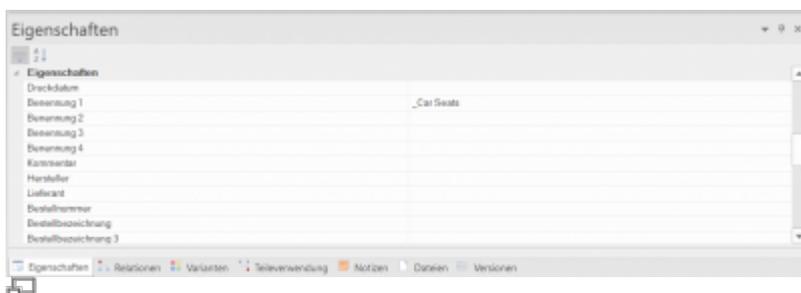
Template file

Select a template file for the new document. A list of template files is linked to the document type.

When all entries have been made, confirm the dialogue with OK. The properties dialogue then appears in order to define further document features.

Document properties

Properties tab



Displays general and specific properties of a document. For example, the manufacturer, the various comments on it or the weight of an item.

Tab Versions

Version	Status	Bearbeiter	Datum	Kommentar	Dokument-ID
1.0	Erstellt	user	18.02.2023 10:41:53	Mussendatenimport	S202305-801-801
1.1	Abgeleitet	user	18.02.2023 11:33:56	Erstausgabe	S202305-801-801-3
1.2	Abgeleitet	user	18.02.2023 11:55:39	* Datafile (S202305-801...)	S202305-801-801-4
	Abgeleitet	user	14.02.2023 10:47:04	* Datafile (S202305-801...)	S202305-801-801-5

Displays the versions and revisions of a document. Each document is displayed with the status, the editor and the document ID.

Menu options:

	View	Displays the selected version in the viewer.
	Open	Opens the selected version in the associated application with write protection.
	Set Current	Makes the selected version the current version. A new version is created at the end of the version list with the data of the selected version.
	Show differences	Shows the differences between the selected version and the current version.
	Purge release	Deletes all versions between the selected revision and the previous revision.
	Properties	Displays the document properties of the selected version.

Files tab

Dateiname	Dateigröße	Datentyp	Geändert	Erstellt
202305-803-001[1].iam	1,62 MB	IAM-Datei	23.02.2023 09:3...	23.02.2023 09:3...
202305-803-001[1].bmp	52,5 KB	BMP-Datei	12.02.2009 18:3...	23.02.2023 09:3...
202305-803-001[1].dxf	510 KB	DWFX-Datei	27.02.2015 14:2...	23.02.2023 09:3...

Displays all files that have been stored with this document. Documents can be added by drag & drop or by menu options. Furthermore, you can select from templates that are defined by the document type.

Menu options:

	View	Displays the selected document in the viewer.
	Open	Opens the selected file in the associated application for editing.
	Store	Stores (checks in) the document. Other users can access the document again. The status of the document is „filed“.
	Add template	Adds a new document file based on a defined template.
	Add File	Adds any file to the document.
	Delete file	Deletes the selected file.
	Export	Exports the selected file to a local directory.
	Send message...	S ends the marked file as an attachment to an email. The email window of your email application opens.
	Send Zip...	Sends the marked file packed as a ZIP attachment to an email. The email window of your email application opens.
	Properties	



The file list can be influenced by the following parameter:

[document.files.sortorder], [session.export.hasfileexportevent],
 [session.export.renameondragdrop], [document.copyout.undecorate].

Relations tab

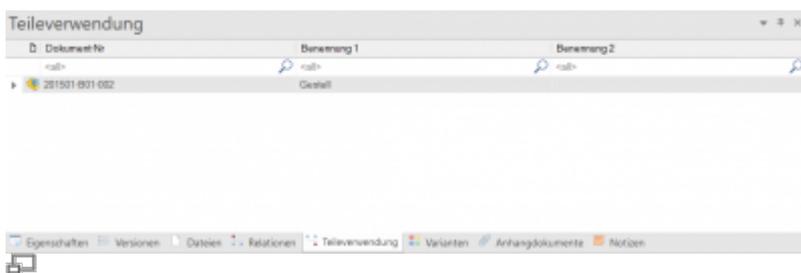


Displays (relation/references) documents used by the document. Other articles/documents used for this document. Double-click on them for more information. You can add relations by: Right Mouse Button > Add Relation

Menu options:

	View	Displays the selected document in the viewer.
	Add relations	Adds a new relation to another document.
	Delete relation	Deletes the selected relation.
	Update relations	Updates the relations.
	Link properties	Displays the link properties.
	Properties	Displays the document properties of the referenced document.

Parts Usage tab

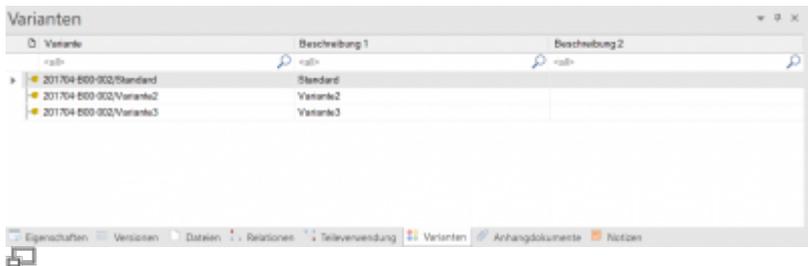


Displays the parts usage. The list shows all assemblies in which the document is installed. Double-click to display more detailed information.

Menu options:

	View	Displays the selected document in the viewer.
	Update part usage	Updates the part usage list.
		

Variants tab



All variants (descending articles) of an article are displayed here. Double-click to display more detailed information.

Menu options:

	View	Displays the selected document in the viewer.
	Delete relation	Deletes the selected variant.
	Properties	Displays the document properties of the variant document.

Attachment Documents tab

Displays all appendix documents.



Attachments are links to other items that are related to this item or that are frequently used with this item. Example: A proximity switch is often installed with a cylinder. The cylinder receives the proximity switch as an appendix part. If you now search for the cylinder in Solidworks in order to install it in an assembly, the matching proximity switch is also immediately available and does not have to be searched for first.

Menu options:

	View	Displays the selected document in the viewer.
	Open	Takes the document in work (check out) and opens the document file in the corresponding application for editing. The status of the document is „In work“.
	Open Drawing	Puts the document to work (check out) and opens the document file in the corresponding application for editing. The status of the document is „In progress“.
	Open with selection	You can select the document file to open.

	Store	Stores (checks in) the document. Other users can access the document again. The status of the document is „Filed“.
	Release	Sets the status of the document to „Released“.
	Add Appendix Part	Adds a new reference.
	Delete attachment	Deletes the reference.
	Properties	Displays the document properties of the linked document.

Notes tab



Notes on documents can be stored here by dragging and dropping. In the menu bar, it is possible to create notes directly.

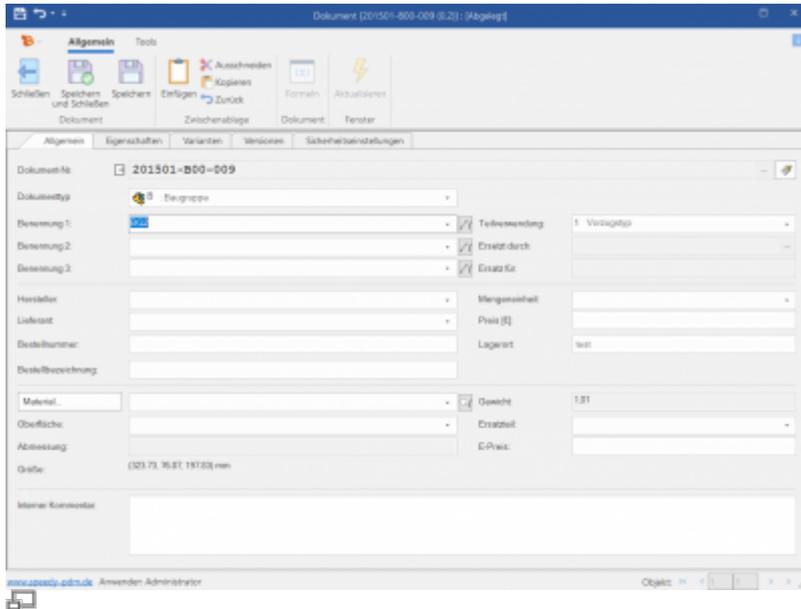
Edit document properties

- **Ribbon: Document > Properties** **{[Ctrl]+[E]}**
- **Context menu: Properties** **{[Ctrl]+[E]}**
- **Toolbox properties**
- **Double click on the document in the document list**

Opens the properties dialogue to edit the document properties

General tab

Displays general system information about the document. Data can be changed or a comment can be added. The manufacturer, supplier, price, material, etc. are queried.

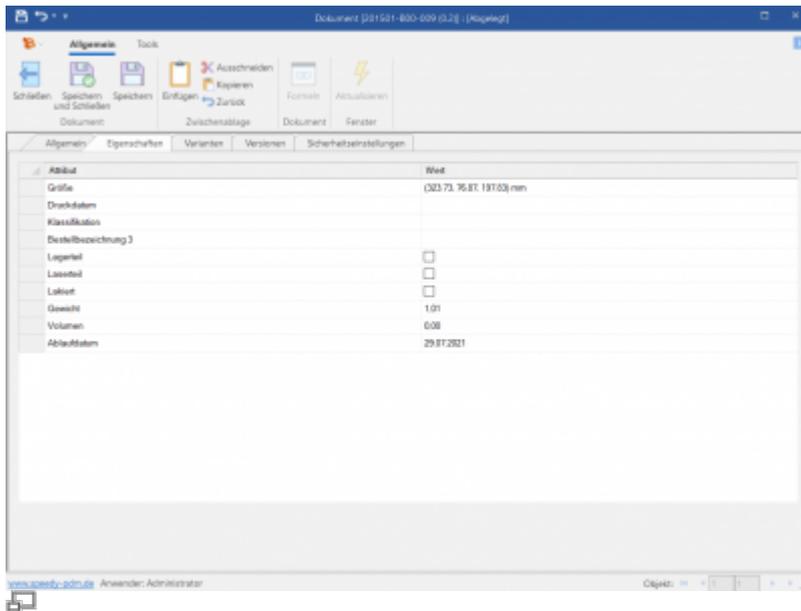


Meaning of the input fields:

Document name	The complete document name is displayed here. If an item (part/assembly) is used once, the document name is highlighted in pink. If an item (part/assembly) is used more than once, the document name is highlighted in red. If the item has already been exported once, the document name appears in blue.
Document type	Shows the document type.
Designation 1/2/3	Article designation
Manufacturer	Manufacturer
Supplier	Supplier
Spare part	Indicates whether the item is a spare part and should be output in the spare parts parts list.
Unit of measure	Select a unit of measure from the list.
Price	Enter the price per unit of measure.
Material	Enter a material name or select a material from the list. By selecting the Material button, you can search for a material in the material database.
Surface	Enter a surface finish or select one from the list. By selecting a material beforehand, the selection options of the list are limited according to the material properties.
Weight	Specifies the part weight based on the data calculated by Solidworks. For single parts, the weight depends on the density defined with the material.
Dimensions	Dimensions of the component. (e.g. length, width, height, thickness, ...) depending on the dimension type
Size	Specifies the size of the part based on the geometry designed in Solidworks.

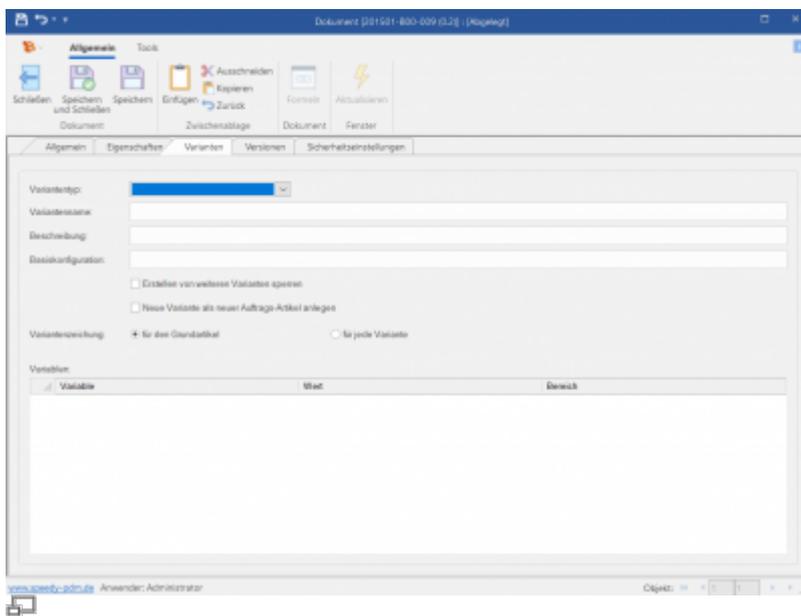
Properties tab

Displays the customised item properties of a document. Values can be changed. Mainly the previous settings are shown, but they will be described in more detail.



Variants tab

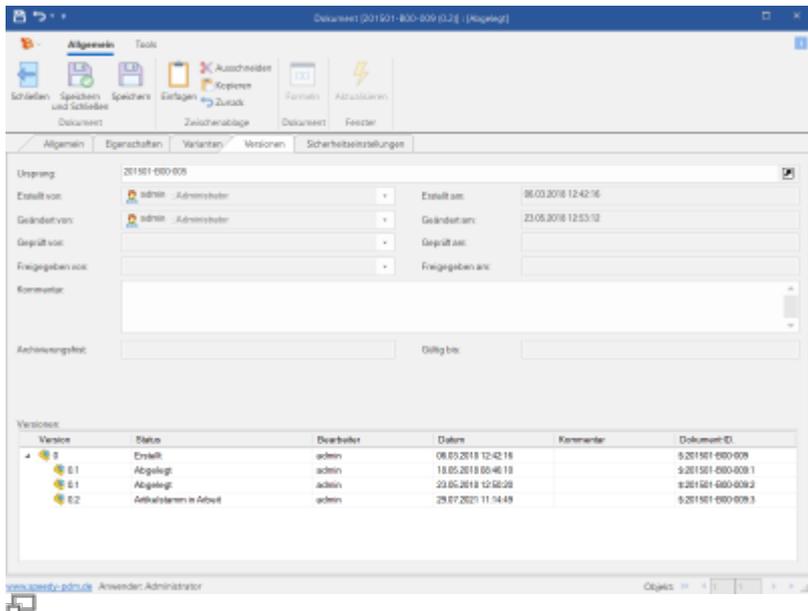
Displays all variants (child items) of a variant item. Variables can be changed. Press [STR]+[mouse click] to open the formula editor for variant articles. This allows you to formulate a formula after naming the variants of an article, for example.



See [Variantenartikel](#)

Versions tab

Here you can view the different versions, see their status and find out who edited the article. It is shown by which user and at what time the article was created. In the lower window, all previous versions of this article are displayed. If the article was copied, the URSPRUNG field indicates the origin of the copy.



Remove/open document

Ribbon: Document „ Open {[Ctrl]+[O]}

Extract toolbox

Open toolbox

Context menu document list “ Open

Select the documents to be opened in the document list. The documents receive the status In work and can now be edited by you or the application assigned to the file type is started and the document file is opened for editing. While a document is removed and has the status In work, it cannot be edited by other users, the document is locked for other users. If the document is released, an additional security prompt appears. You have the choice of opening the document read-only or unblocking it and editing it.



Open with selection

Menu: File > Open with selection

Context menu: Open with selection

Opens a window in which you can select the file you want to edit.

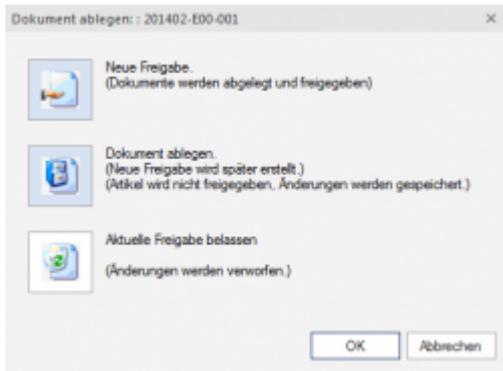
File document

Ribbon: Document „ File {[Ctrl]+[S]}

File toolbox

Context menu document list “ File

Select the documents to be filed in the document list. The documents receive the status Filed and can now be edited by other users. If the document was previously released, an additional prompt appears.



New release

Documents are filed and directly released again.

File document

Documents are only filed. A new release can be created later.

Leave current release

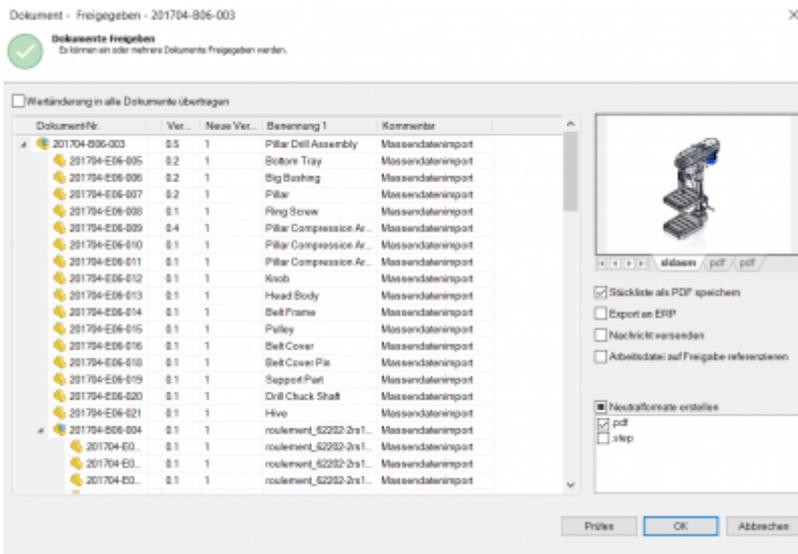
All changes are discarded.

Share document

Ribbon: Document „ Share {[Ctrl]+[R]}

Share Toolbox

Context menu document list “ Share



Release dialogue

Select all documents to be released in the document list. The documents are given the status released.

All files of a released document are stored in a special directory so that the released status is retained in case of further editing (new version). The file status of an older release can be retrieved at any time. Of course, this also applies to assemblies and their references to other assemblies and parts.

The release dialogue shows all documents to be released and referenced.

In the table, a different „New Version“ can also be assigned manually for each document.

A release comment can be assigned for each document. If the check box „Transfer value change to all documents“ is activated, a comment entered once is transferred to all documents. The switch must be set before a comment is entered so that the values are transferred.

The release comment can, for example, be printed in the header of a drawing in the change index.

The following options are available for the release:

Save parts list as PDF

The parts lists are also saved as a PDF file on the item when they are released.
(See also configuration parameter [document.release.bomfiletype])

Export to ERP

The article and parts list data are transferred to the ERP system upon release.
(See also configuration parameter [session.export.onrelease])

Send message

After approval, a message is sent to all set recipients.
(See also configuration parameter [document.release.message.xxx])

Reference work file to release

The references of the work files of assemblies are also referenced to the shared files.
(See also configuration parameter [document.release.relink.work])

Create neutral formats

Neutral formats are created or renewed.

The switch is a 3-value switch:

If the switch is deactivated, no neutral formats are created.

If the switch is activated, neutral formats are created from all files, regardless of whether they have already been released.

If the switch is partially activated, neutral formats are only created from files that are to be newly released.

Check

All documents that have not yet been released are checked to see whether any mandatory fields defined in the item master have been filled in correctly.

The check can be carried out manually by clicking on the „Check“ button, otherwise the check is carried out automatically before release.

If mandatory fields are not filled in, a corresponding error message is displayed.

Via the configuration switch **document.release.extended.checkrevisions** you can set whether the check should also check for older revisions. If a newer revision exists for a document, it is displayed in blue in the list. **blue** in the list.

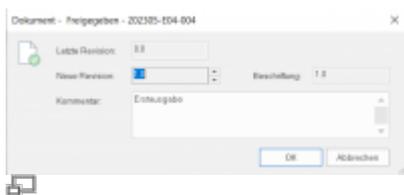
Double-click on an entry in the list to open the item master.

Please note that for assemblies that contain sub-parts, the item master is only called up by holding down the control key [CTRL+double-click].



Some options may not be available in the dialogue or may be greyed out, depending on the administrative setting (configuration parameter is defined as Global).

The simple release dialogue can be used by deactivating the configuration parameter [document.release.extended].



Simple release dialogue

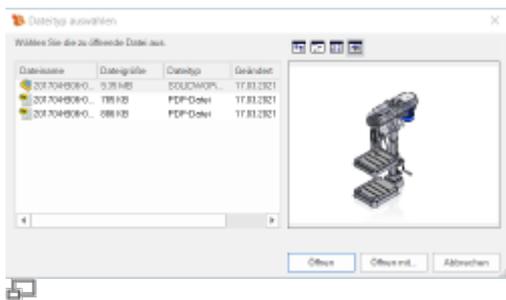
View document

Ribbon: File „ View {[Ctrl]+[Q]}

View toolbox

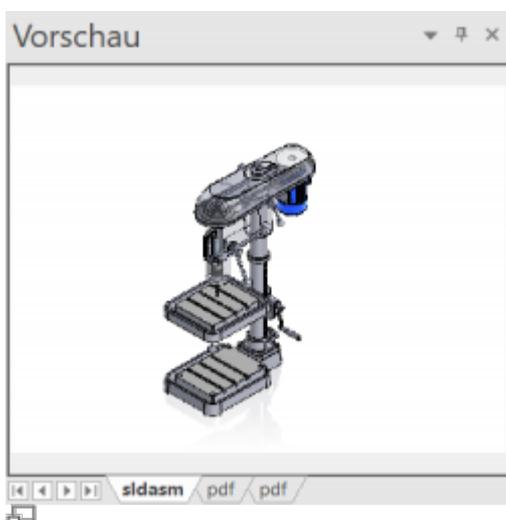
Context menu document list “ View

Select the documents you want to view in the viewer. The viewer linked to the corresponding file type is started and displays the document file. If no specific viewer application is defined, the document file will be opened in the appropriate application in read-only mode. If there is more than one file for the selected document, you must select the file to be viewed.



Document preview

If you select a document in the document list, a quick view is displayed in the document preview. If there are several files for the selected document, a tab with the corresponding quick view is displayed for each file. Clicking on a tab displays the corresponding quick view.



By pressing the middle mouse button in the document preview area, you can enlarge the quick view for some file types. The enlargement is either full-screen or in the available view size.

The preview window remembers the last file type displayed. When switching to another document, it tries to display the previously remembered file type again. However, if the sort order of the file list is controlled by the parameter [document.files.sortorder], the first file is always displayed in the preview window. If no sort order is defined but the parameter [document.preview.openfiletype] is activated, the first available file type from the list of standard file types ([document.openfiletype] + [document.openfiletype2]) is selected.



The preview can be influenced by the following parameters:
 [document.preview.openfiletype], [document.files.showhidden],
 [document.files.exthide], [document.files.sortorder].

Part usage

Ribbon: Properties „ Part Usage
Context menu: Part usage

applied to all other documents.

With the switch **Transfer value changes to selected documents** you can have a column filled in automatically for selected documents. I.e. if this switch is set, as soon as you change something in a document, this is applied to all currently selected documents. Multiple documents can be selected by holding down the Ctrl key while clicking or by selecting a range with the Shift key. Then simply type in the desired value. The dialogue then applies the values to the selected lines.

Column descriptions can be defined for mass data entry. These column descriptions must be of the type „**edit massedit document mass data**“. If several column descriptions are defined, they can be selected from a list in the dialogue. The dialogue remembers the last selected column description and opens the dialogue with it the next time. In the column description you can define which columns remain pinned when scrolling. To do this, the check mark **Indented** must be activated. If this is ticked, the column is permanently defined. The columns can be specified in the column description with width. With the checkbox **Automatic column width** the width of the columns can also be automatically adapted to the window size.

Reference Manager

Ribbon: Document “ Properties „ Reference Manager

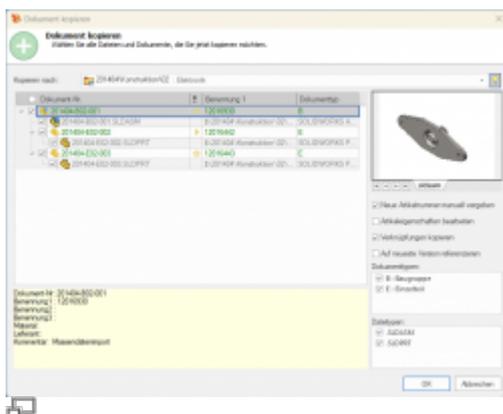
Copy document

Ribbon: File “ Copy

Copy toolbox

Context menu document list „ Copy

Creates a copy of the selected document.



The document and all associated files are displayed in the structure. The document selected for copying is already marked.

If the document to be copied is an assembly that references parts or subassemblies, these are also displayed in the structure and can be marked for copying.

- By selecting „New item number“ you determine that the New dialogue for specifying the item

number or designation is called up for each new document.

- The option „Edit item properties“ opens the properties dialogue for each copied document.
- The option „Copy links“ defines whether the links to appendix parts or links to other documents are also copied.
- The option „Reference to latest version“ always lets the copied documents reference the latest version of a file. The copy dialogue shows the current references of the files. However, if a newer version of a file exists in the meantime, this option ensures that the most recent version is used.

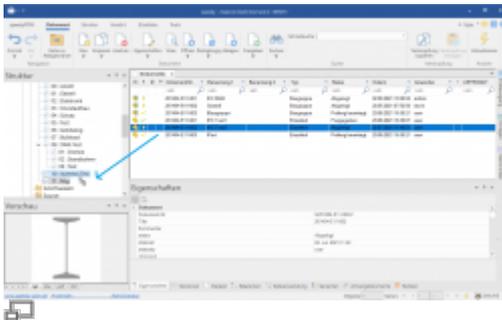


The following configuration parameters influence the copy dialogue:

```
[document.copy.checkbaseparts], [document.copy.checkprojectnotequal],  
[document.copy.copyattached], [document.copy.createnew],  
[document.copy.description], [document.copy.editproperties],  
[document.copy.extensions], [document.copy.layouts], [document.copy.maxlevel],  
[document.copy.newestversion], [document.copy.selectall], [document.copy.validate],  
[document.copy.uncheckedextensions].
```

Copy via drag and drop

You can also copy a document to another folder or project using drag and drop.



Select the document in the document list and drag it with the left mouse button pressed, a [+]
symbol appears at the mouse pointer, over the destination folder until it is marked in grey.

If no [+] symbol appears on the mouse pointer, you are still in move mode. By holding down the [Ctrl]
key, you force the copy mode.

After you have released the mouse button, the Copy Document dialogue appears.

Linking by Drag and Drop



To create a link to an existing document in another folder or project, select the document in the
document list and drag it over the target folder by holding down the [Ctrl]+[Shift] key until the folder
is highlighted in grey.

After you have released the mouse button, a link is created to the document in the destination folder.

This is recognisable by the left symbol.

Copy document in the same project

If the article is to be copied in the same project by drag & drop, hold down the [Ctrl] key. The mouse symbol changes to a [+].

Copy document properties to the clipboard

[Ctrl]+[C] in the document list copies the document objects and the document number to the clipboard.

If several lines are marked, the document numbers are also copied to the clipboard separated by a line break.

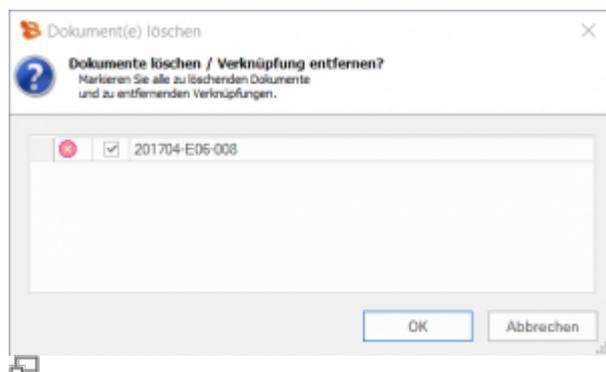
If the mouse pointer is positioned over a column, the property of the column is copied to the clipboard instead of the document number.

Delete document

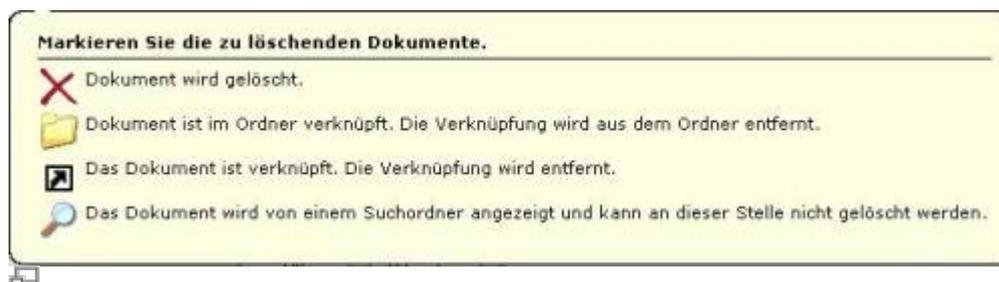
Ribbon: Document “ Delete {[Ctrl]+[X]}

Delete toolbox

Context menu document list „ Delete



The marked documents are listed again for confirmation in the „Delete Documents“ dialogue after the command has been called. All documents that can be deleted are marked in the list. The list symbolises whether the document or a link to the document will be deleted (see also the tooltip).





Items that have already been exported once (export to merchandise management) can only be deleted by the administrator.

Lock document

It is possible to lock documents via the purpose of use and thus define changes, installation in assemblies and properties. The document can then no longer be edited.

A user who has the authorisation: **UsageEditProperties** can, however, continue to edit and change them.

Necessary settings for the usage purpose:

- Allow editing → Unchecked
- Allow insertion → Unchecked
- Check user rights → ticked
- Possibly remove the purpose from the direct search.

This locks the document for this purpose.

Undo

Ribbon: Edit > Undo **{[Ctrl]+[R]}**

Context menu: Undo **{[Ctrl]+[R]}**

Undoes the last editing of a document.

Undo approval

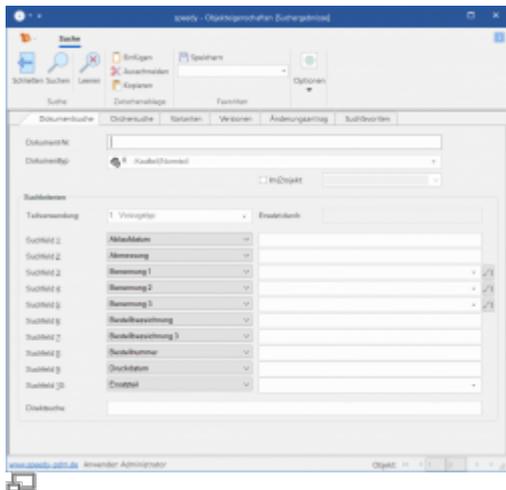
Ribbon: Edit > Cancel Release

Cancels the last release. The revision counter is reset. The document can then be edited normally again. However, the document is in such a state that it is waiting for a new release. This is indicated in the document list by a corresponding symbol.

Search documents

Ribbon: Structure > Search **{[Ctrl]+[F]}**

Search Toolbox



speedy offers various possibilities to search for documents by their properties and to list them in a hit list (search results in the navigation window). The following criteria apply to all options:

- The search for documents is only carried out within a locker.
- The search is based on the current document versions, i.e. older versions/revisions are not included. In the version window, the latest version/revision that meets the search criteria is highlighted.
- The documents found are automatically displayed in the document list and can be edited from here.
- When searching for text entries, the * or % sign can be entered as a placeholder for any text:
Ex: all documents containing „MV5“ in the designation “ *MV5* all documents whose designation begins with „On“ „ On*.
- When searching for text entries, the ? character can be entered as a placeholder for any character.
- Text entries are not case-sensitive.
- Special characters (* ? % _) in the search can be masked with a so-called escape character (\).

Enter your search terms in the respective input fields.

All entered search criteria (input fields) are linked with AND, i.e. all search criteria must be fulfilled in the document properties. Example: Entering *Holder* in the document name and Festo in the supplier searches for all documents that have the term holder in the document name and have Festo defined as the supplier.

If you want to search for several criteria in one input field, the search criteria must be separated by || characters. Example: You want to search for all items that have Bosch OR Festo as supplier > Bosch || Festo.

Search filter:

Filter	Meaning
<> wert	Der angegebene Wert darf NICHT vorkommen
> value	Search for values greater than the specified value.
< wert	Suche nach Werten, die kleiner sind als der angegebene Wert.
>= value	Search for values that are greater than or equal to the specified value.
≤ wert	Suche nach Werten, die kleiner oder gleich sind als der angegebene Wert.
*	Beliebiger Text an der Stelle

Filter	Meaning
?	Beliebiges Zeichen an der Stelle
wert1 wert2	Suche nach Wert1 oder Wert2
wert1 OR wert2	
condition1 & condition2	Suche nach Bedingung1 und Bedingung1.
condition1 AND condition2	z.B. >50 & <80
wert1 :: wert2	Wertebereich zwischen Wert1 und Wert2
wert1 BETWEEN wert2	



Wenn Sie immer wieder nach den gleichen Begriffen suchen müssen können Sie hierzu einen Suchfavoriten ablegen. Definieren Sie Ihre Suchbegriffe im Suchdialog. Anschließend geben Sie den gewünschten Favoritennamen in der Kombinationsliste (linke untere Ecke des Suchen Dialogs) ein und betätigen den Speichern Schaltknopf.



Die Suchfavoriten stehen Ihnen zum schnellen Zugriff im Aufklappmenü unterhalb der Suchen Schaltfläche direkt zur Verfügung:

Schnellsuche

Mit der Schnellsuche können Sie eine Dokumentsuche auslösen, die automatisch in den wichtigsten Datenfeldern der Dokumenteigenschaften sucht.



Werkzeugkasten Schnellsuche

Geben Sie einfach den gesuchten Begriff in das Schnellsuchfeld ein und bestätigen Sie mit der Eingabetaste. Beispiel: Sie suchen einen Zylinder: Eingabe in der Schnellsuche Zyl

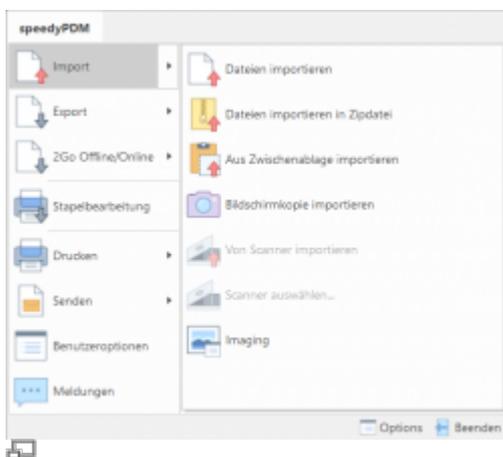
Es werden alle Artikel aufgelistet die Zyl im Dokumentnamen, der Benennung1, Benennung 2, Benennung 3, Lieferant, Material oder Oberfläche haben.
Sie suchen alle Teile, die als Oberflächenbehandlung eloxiert sind: Eingabe in der Schnellsuche eloxiert

Dateien importieren

Ribbon: File » Importieren » Datei importieren

Importiert eine oder mehrere gewählte Dateien und erstellt daraus jeweils ein speedy/PDM Dokument. Wechseln Sie vor dem Befehlsaufruf in den gewünschten Ablageordner mit Hilfe des Navigationsbaums. Nach Befehlsaufruf werden Sie aufgefordert eine oder mehrere Dateien auszuwählen. Der Dialog für ein neues Dokument wird angezeigt. Der Dateiname wird bereits als Benennung vorgeschlagen. Nehmen Sie weitere Einstellungen vor und bestätigen Sie den Dialog mit OK. Der Artikel wird angelegt und die Datei im speedy/PDM Schließfach abgelegt. Wenn Sie mehrere Dateien importieren erscheint nach dem ersten Import die Abfrage, ob die weiteren Dateien automatisch importiert werden sollen. Wird dies mit „Ja“ bestätigt, werden alle weiteren Artikel automatisch importiert und abgelegt.

Speedy unterstützt das Importieren von Dateien per Windows Drag & Drop oder über die Zwischenablage.



Zu ZIP importieren

Menü: Datei > Import > Import to ZIP

When importing one or more selected files, they are packed as a ZIP file and imported as a speedy/PDM document.

Import from clipboard

Menu: File > Import > Clipboard

Imports the content of the clipboard as a new speedy/PDM document.

Import snapshot

Menu: File > Import > Snapshot

Imports a screen snapshot as a new document.

Import TWAIN

Menu: File > Import > TWAIN > Import

Imports an image from a TWAIN compatible device (e.g. scanner or camera). After the command is called, a device-specific dialogue appears. Make all settings here and scan an image. After successful scanning, the New dialogue appears and prompts for further entries. In most cases, the scanner dialogue remains active and allows further scanning of images.

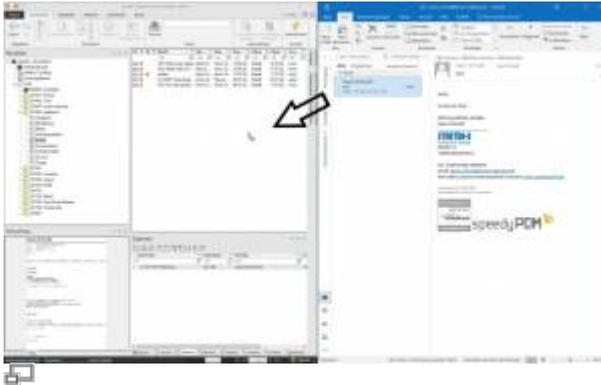
Select TWAIN source

Menu: *File > Import > TWAIN > Select Source*

Allows you to select a TWAIN compatible device. If there are multiple TWAIN compatible devices, you can select the device to use before importing.

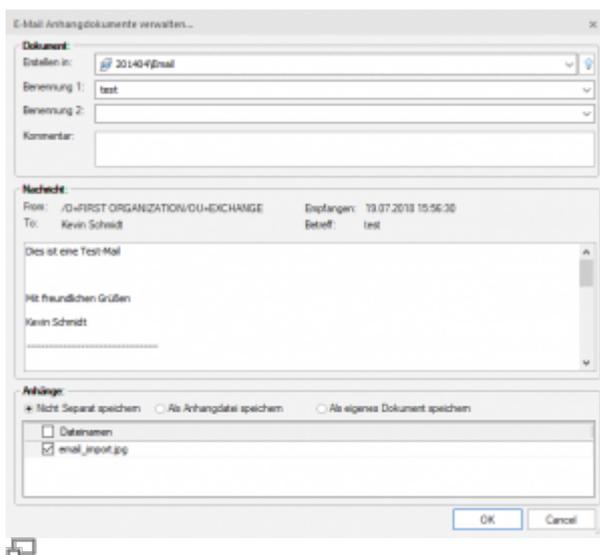
Import Outlook Email

Outlook emails can be dragged and dropped into speedy: Drag and hold the Outlook email with the left mouse button and drop it in the document window.



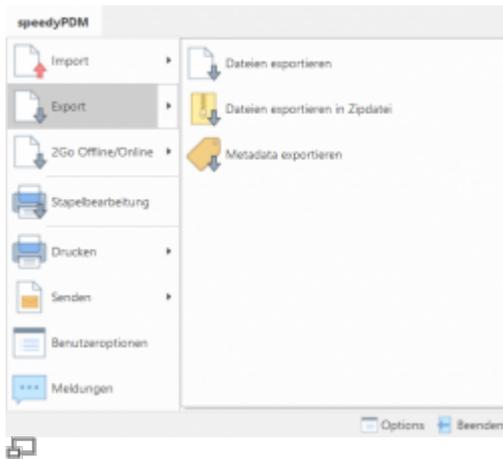
A new dialogue for emails opens in which all settings for the email document can be made.

If there are attachments to the email, a dialogue opens in which you can select what happens to the attachments. Here you can make general settings for the email document and also settings for the attachment. Attachments can either be saved as an independent new document (**Save as own document**) or attached to the email as an attachment file (**Save as attachment file**). If the email is only to be saved as such, this can be done with the selection **do not save separately** can be done.



If the attachment is to be saved as an independent document, you can enter the document settings such as document type, container and naming directly and no new dialogue is required for the attachment. If you leave e.g. the document type empty, a new dialogue is called up for each attachment. Only attachments that are ticked are imported!

Export

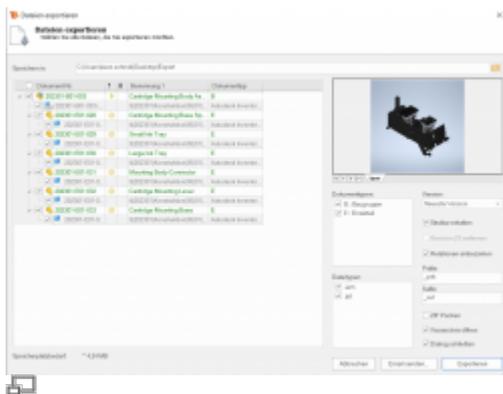


Export files

Ribbon: SPEEDY > Export > Export file

Exports the files of one or more documents to a local directory or a zip file.

Select all documents whose files you want to export. If whole assembly structures are to be exported, it is sufficient to mark the top assembly for export. The export command shows all sub-assemblies and parts referenced by an assembly.



The list shows all files of the previously selected documents. Individual files can be deselected again here. To deselect or select individual files, click on the respective checkbox in the list.

Save in

Defines a directory into which the files are exported.

ZIP Pack

Activate the check box to export the selected files packed as ZIP. The property „Save in“ now defines a file name for the ZIP file.

Version

Select a specific version of the document for export.

Remove revision [?]

Defines whether the revision number should be removed from the file name for revisions.

Preserve structure Defines whether the file storage structure as it exists on the file server is preserved in the export. If this option is deactivated, all files are exported to one directory.

Filter file type

The list shows all file types of the files to be exported. By activating or deactivating a file type, the corresponding files are selected or deselected in the file list.

Export to ZIP

Ribbon: **SPEEDY > Export > Export as zip file**

Menu: *File > Export > Export file as ZIP*

Exports the files of one or more documents packed as ZIP into a local directory. The „Export File“ dialogue appears with the „ZIP Pack“ check box already activated.

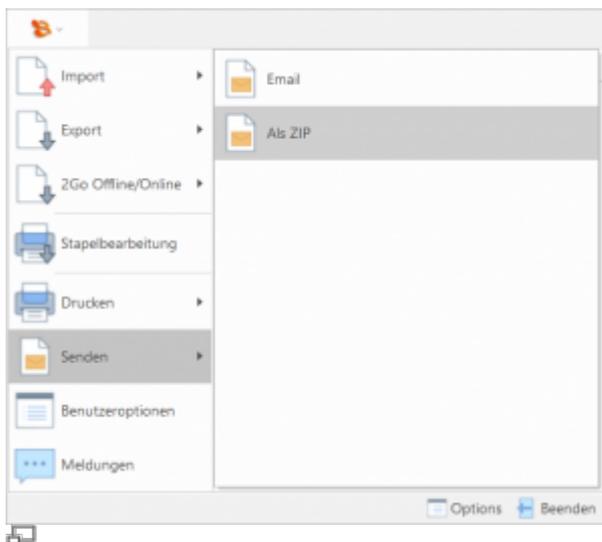
Export document data

Ribbon: **SPEEDY > Export > Export Metadata**

Exports the document properties of one or more documents. All document properties of the previously selected documents are exported to a file. The following file formats are available:

- XML - format
- CSV format
- Excel workbook
- Rich Text Format

Send Message/Zip



Send message

Menu: *File > Send message*

Sends the files of the marked documents by email. All files of the previously marked documents are attached to a new email.

Send ZIP

Menu: *File > Send ZIP*

Sends the files of the selected documents by email. All files of the previously marked documents are packed into a ZIP file and attached to a new email.

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