PROMAN Software GmbH Software for Project Management and construction project management



PROMAN meeting report

QuickStart:

- Create project
- Creating Addresses
- First protocol

Version 3.6

Mai 2021

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1. General information

In this document you get all necessary information to create your first project successfully. This includes

- Create a project
- Transfer the print settings from another project (template project)
- Create addresses
- My first collection of reports and minutes
- Printout and eMail of the protocol

All descriptions are valid from software version 3.3. If you have an earlier version, please contact the hotline (+43 1 478 05 67) to install the latest update.

2. Create project

With a right mouse click on the menu File / New / Project you can create a new project.



This opens the following mask:

🔀 New project	1	×
Basic project inform. Enter all needed possibility to crea	values and the set of the set	
Project shortname *	2019/40	
Project longname *	PROMAN Training	
Brief description		
Description		
* Required fields	< Back Next > Cancel	

Field description:



- "Project shortname": enter the short form of the project here (e.g. project number)
- "Project longname": The project heading is entered here.

The remaining fields are optional.

With the button "Next" you get to the following mask:

🔀 New project	x
	Completing the wizard
	The project was created successfully. You can edit project details and/or import project data from another project.
	Edit project details Copy structure from existing project
	To dose this wizard, dick finish.
* Required fields	< Back Finish Cancel

Please select "Copy structure from existing project".

This allows you to easily copy the following elements from an existing project (template project / sample project):

- logo
- font
- standard text blocks (e.g. opposition deadlines, e-mail text for protocol dispatch)
- whole report collections (e.g. construction meeting, building owner meeting) incl.
 - o chapter structures
 - o point status
 - o print settings

In the following screen you can decide what should be copied. Since it is a copy, you can change all this data afterwards.

I also recommend these steps if you only have the included example project.

You can also copy these settings and data after you have created a project.

The currently created project is opened automatically. For this purpose, the selection mask for the "Adopt project structure from existing project" is also opened.

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- # ×	PROMAN Training : Project addressbook (2019/40) PROMAN Trainin		 Toolbox
٩			Projects Choose project
			Project shortname Project longnam O
omplete c jht empty			
tname ▶ 1 4 × ₽	Continue by s	electing a project from the toolbox	
			Save

Select your source project in the right area. In this example, we use the sample project as a source for our template data.

In the following mask you can adopt individual areas of the template (e.g. logo only).

I recommend that you use the button "All data without project participants" to transfer all template data.

In the target project you can then remove or modify unused elements.

No item contents are taken over with this function!

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IAN Training : Project addressbook (2019/40) PROMAN Trainin	ng ×		Toolbox 4
			Projects
Template project	Copy all 🕨	Current project	BEISPIEL
Client	Сору 🕨 🤻		Enter text to se 🔻 Find Clear
Project author	Сору 🕨		Project general data
Project address	Copy 🕨		Project addresses Attributes
Header		Header	Company and Employee Functions
PRO MAN	Сору	No image data	Report collections
Text	Сору 🕨	Text	×
Footer		Footer	Quick Selection
No image data	Сору 🕨 🤻	No image data	비 All data without project partners
Text		Text	
۵. ۲	Сору 🕨		* *
			Save

2.1. Change Logo

If you have taken the data from the example project, you will surely want to change the logo.

Right-click on the project, in this case on "(2019/40) PROMAN Training", then on "Manage project":

🔀 PROMAN Phenix				
FILE EDIT VIEW TOO	LS HELP			
Project View	□ # ×	PROMAN Trai	ning : Project addr	essbook
2 Refresh project	ct-explorer	Main view	Employee view	
1	<u>^</u>		1	
 (2019/40) PROMAN Tra (2019/40) PROMAN Tr 	Manage project			Long
🗉 (BM) Building Meeting	Project rightsmana	gement		
🗄 (CD) Construction Dia	Project addressbool	k		
 	Search and Reportir	ng		
	Manage project attr	ibutes		
⊞ (PM) Project Meeting	Addressbook synch	ronization		
	Copy project struct	ure		
	New project			
	New folder			
	Delete project			
✓ Show chapters	Assign project attrik	outes		
Show attachments	Highlight empty		-	



On this page you have the possibility to change the areas header bar / footer bar / project image. You could also change the project name.

In the header tab you can load the desired new logo with "Load image". You have to define the alignment (right, middle or left) and the logo size in mm on the right side.

PROMAN Training : Project addressbook 2019/40: Toolbox ųх * Manage project attributes Project shortname / number * 2019/40 Projectcode client * Assign project attributes Project longname * PROMAN Training Associations Client Select a projectbased company Project author Select a projectbased company Project Address Select a projectbased company Description Brief description Description _____ Footer Project-Image Height in mm 33 Î Print without borde Width in mm 50 🇘 Θ Revert to original size Alianment 0 ‡ Load image × Remove Image ◆ ★ ↓ 🗴 🖄 🔓 ↓ 🛛 目 目 日 〒 - 車 車 目 三 三 日 ¶ 💁 • ♡ ↓ 🦻 B I U S X² X₂ A ▾ Calibri 🔻 11 💌 A A A 🏜 👻 👳 🖁 👬 🛱 👳 A 1 1 1 1 1 2 1 3 1 4 1 5 1 6 1 7 1 8 1 9 1 10 11 11 1 11 12 1 13 1 14 1 15 1 16 1 22 1 23 1 18 × Close 凹 Save * Required fields 믭 Save & dose B4DD-5206) 🔤 Lo

The changes can be accepted with "save" or "save & close".

3. Creating Addresses

When creating addresses, you must first decide whether you want to create them

- central, i.e. cross-project, or
- in the project

If you create the addresses centrally, they can be used for several projects.

3.1. Creating Addresses Centrally

The central address management can be accessed under tool / show central address book:

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X PROMAN Phenix		
FILE EDIT VIEW	TOOLS HELP	1
Project View	Show central addressbook	Training : Project addressbook
2 Refresh	Settings	v Employee view
	Central layout manager	
(2019/40) PROMAN 1	Laptop-Mode	Lon
(2019/40) PROMAN		2013
🗄 (BM) Building Meetin	Project & Report Export	
🕀 (CD) Construction D	Project & Report Import	
🗄 (MR) Monthly Repor	Administration	
🕀 (NT) Note	Administration	
🕀 (NT-INT) Internal N	Search and Reporting	
🕀 (PM) Project Meeting	1	

Then another tab "Central Address Book" opens:

ιx	PROMAN Traini	ng : Project :	addressbo	ook Cer	ntral addressbook 🗙								-	Toolbox		4
٩	Short			Long		_		Address		Country	City	Postcode	ン State Disabled	0	Create Company	Create Employee
_	D PROMAN			PROMA	AN Software GmbH			Zwinzstraße	≥ 4-6	AT	Wien	1160	Vienn 🗗	Ð	Edit Company	Edit Employee
	Employee	Phone	e-mail	address	Company function	Attributes								×	Delete company	× Delete employee
	Short	First	Name	Lastnam	e Abbreviation	De	partment	Gender	Title	Name Suffi	c Title Inte	rn Disable	d	*	Company functions	K Employee function
	Dezzei	Rola	ind	Pezzei				Male	DI				ſ			·
	⊞ Support			Support				Unknown					ſ			
	Titze	Rud	olf	Titze				Unknown	Ing.				ſ	*	Manage cer	ntral attributes

Addresses can be created with the right mouse button at the desired company or with the buttons in the toolbox.

Each person must be created in a company.

You have to create a company first. The following mask opens with the button "Create company":

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		×							Add phone	number		
						Type	Nu	umber		Comment	Is Default	Т
	No image data		Drop outlook cont	tact here or click to insert	: vCard (*.vcf) from clipboa	Main	* +	431234			•	3
Short *	new Company	1										
.ong *	new Company Ltd											
Street												
ostcode		C	Dity			-						
Country	Choose country					-						
itate						·						
ost Box		F	Post Box P.C.						Add e-mail	address		
omepage						Type	E	-mail		Comment	Is Default	+
AT						Marre	-m • u	nice@newcompar	ty.com			
econdary site of	Choose company					-						
enartments	Let i											
apar anona	Short	Longna	ame		e Add							
ay a Unu na	Shortname Long	Longna	ame		Add							
	Shorthame Long	Longna			Add							
	Short Long	Longni	Assign comp	any attributes	Add	There a	are no fun	ctions available fo	r this *	Manaç	ge functions	
	Short Long Attribute	Longni	Assign comp	pany attributes Value	400	There a Short	are no fun	ctions available fo	r this *	Manaç	pe functions Is Default	
ttributes	Short Long Short Long Attribute	Longn	Assign comp	oany attributes Value		There a Short	are no fun Lor	ctions available fo	r this v X	Manag	e functions Is Default	

All fields which we recommend for the company are marked with red. The remaining fields are useful if you want to use additional information for companies.

In the field "Short" please enter a generally known short form of the company.

Then use the right mouse button to create a corresponding employee for the newly created company "Create Employee":

She	ort			Long				
	PROMAN			PROM	AN Sof	tware GmbH		
	Employee	Phone	e e-mail a	ddress	Com	pany functior	n At	tribut
	Short	Fir	rst Name	Lastnam	ne	Abbreviatio	n	
	🗄 Pezzei	Ro	oland	Pezzei				
	⊞ Support			Support				
	🗄 Titze	Ru	udolf	Titze				
± 1	new Compan	Edi	it Company					
		Cre	eate Employ	ee	_			
		pas	ste employe	e				
		Del	lete compar	ny				
		Ass	sign compa	ny attrib	utes			
					~	• •		

This opens the following mask:

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		×						(Add phonenumber			
							Phone	Number	c	omment	Is Default	:
	No incore des		Dress av Marsh		in and the Court (\$ 1100 from slinks		Phone	+431234 23			۲	3
	No inage da		2102 001000									
nort *	Doe				X Edit longn	ame						
rst Name	John											
stname	Doe											
obreviation												
ender	Male					-						
de			Nar	ne Suffix								
de Intern												
epartment	There are no depart	tments available for th	iis employee!			-			00000	1		
unctions 📕	There are no function	ang available for this e	mployee!	- %	Manage function	s			Add e-mail address			
	Short	Long		~	Is Default		Type	E-mail	G	mment	Is Default	
	PM	Project manageme	ent		۲	x	Work	iohn.doe@nei	wcompany.com		۰	
tributes			X Assian em	ployee attributes								
	Attribute		~	Value								

All fields that are to be filled as employees are highlighted in red.

In the field "Short" please enter a generally known short form of the person (e.g. surname). This field must be unique for each company.

The employee function can be printed directly on the cover page in the participant distribution list.

You can also create companies directly from Outlook using drag & drop e.g. you simply drag the desired contact into the field "Drop outlook contact here or ...":



With this method you can create companies as well as employees.

You can also synchronize the complete Outlook address book. Further information can be found in the training documents or if you call the hotline.

3.2. Use addresses in the project

centrally created addresses can be activated in the project using drag & drop. To do this, go back to the "Project Address Book" tab and drag the desired address from the lower left "Central Address Book" window into the "Project Address Book" window:

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FILE EDIT	VIEW TOOLS	HELP					
Project View			щ×	PROMAN Tra	aining : Project addr	essbook	Central addressbook
9	Refresh project-	explorer		Main view	Employee view		
(2019/40)	PROMAN Training			Chart			
⊟ (2019/40)	PROMAN Training			SHOL		0	ong
🗄 (BM) Build	ling Meeting						
🗄 (CD) Con	struction Diary						
(MR) Mon	thly Report						
Image:	2						
🗄 (NT-INT)	Internal Note						
🗄 (PM) Proj	ect Meeting						
(cc) c-f-	ty Charle						
Show cha	apters	Show cor	nplete d		1		
 Show cha Show att Order rep Order rep By chapter 	apters achments ports descending er By itemcode	Show cor Highligh By shortr	mplete c t empty name		1		
 Show cha Show atta Order rep Item sorting: By chapter 	apters achments ports descending er _ By itemcode	Show cor Highligh By shortr	mplete c t empty name		1		
Show cha Show att Order rep tem sorting: By chapte Central addre	apters achments ports descending er By itemcode	Show cor Highligh By shortr	mplete c t empty name				
Show cha Show att Order rep Item sorting: By chapt Central addre Short	apters achments ports descending er By itemcode issbook	Show cor Highligh By shortr	nplete c t empty name				
Show cha Show att Order rep Item sorting: By chapte Central addre Short PROMAN	apters achments ports descending er By itemcode issbook Long PROMAN So.	Show cor Highligh By shortr	nplete c t empty name				
Show cha Show att Order rep Item sorting: By chapte Central addre Short PROMAN Recomp	apters achments ports descending er By itemcode issbook Long PROMAN So pany new Compa.	Show cor Highligh By shortr	nplete c t empty name				
Show cha Show att Order rep Item sorting: By chapte Central addre Short PROMAN new Comp Short	apters achments ports descending er By itemcode issbook Long PROMAN So pany new Compa. First Name	Show cor Highligh By shortr	nplete c t empty name n x p				

Alternatively, you can do this with the right mouse button:

h	ort	Long		
	PROMAN	PROMAN So		
	new Company	new Compa		
	Short	First Name	Lastname	
	Doe	Add to projec	t	

4. Rename Report Collection

In this example, we have copied all report collections from the sample project.

If the names are not suitable for your project you can rename or delete them.

To rename, simply right-click on the desired report collection and select "Manage report collection":

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	n raining
(BM) Building Meet (CD) Construction	Manage report collection
 : (MR) Monthly Rep 	Edit next agenda
🕀 (NT) Note	New report
(NT-INT) Internal I	Manage report-codes
 	Manage chanters
	Manage toythlock templates
	Delete exect cellection

In my case I want to change the "Building Meeting" to "Building Jour Fix":

Hide collection	
Collection shortname BM Sorting Number 0 1 Folder PROMAN Training	Enter text to se Find Clear
Collection longname Building Jour Fix	Setting names
Collection Hite Inversion	Report collection settings
	Common
	Header
Description	Project image
	✓ Cover settings
	Common
Document path 0: Schulung/Schulung/Beispielprojekt\	Participant / Mailing
Document number 2019/40/8M/001	Report content settings
	Common settings
Endless protocol	Chapter and report item
Protocoltype Memo	A Report item settings
	Common
Print language German 👻	
2 Link default settings to last Renort Lie, changes in the last report for textblocks, dog menthanes, email- and agenda-settings will be saved automatically to this report collection	Copy collection settings
	Projecto
	Choose project
	Report collections
	Choose report collection
	Copy settings and save
	Close
	Save
	Save & dose

For this I can enter the desired new name in the field "Collection longname ".

5. My first report (Minutes)

In the desired report collection, please click the right mouse button and select "New report":



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1160 Vienna, AUSTRIA
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Short Image: Image: End of the second se 🗄 (NT) No New report ∃ (NT-IN) Manage report-codes (PM) Pr Manage chapters 🗄 (SC) Sa Show c Manage textblock templates Show a Delete report collection Order reports aescenaing

In the following mask please confirm the creation of the new report with "Save & Close". The new report editor then opens:

Training : Project address	book Central addressbook (BM)	Report 001: Report editor 🗙		•	Toolbox	
					0	Create new report item
					O	reate new report item and open
			NU		0	Import report items
		D/I			0	Load report items
			AN		×	Send e-mail
PROMAN	Training				8	Print report (Print-Preview)
					refi	Print report as pdf
Jour Fix					÷	Print report as rtf
Building Jour	Fix No.: 001				÷	Print report as xlsx
Dets of laws	00.40.0040	Desired as a	2010/10	1	R.	Prepare for meeting
Date of Issue: Date of Meeting:	09.12.2019	Project-no.: Docno.:	2019/40 / 2019/40/BM/001 /		ľo	Open agenda for this repor
Time:	from:	Chairman:	No author selected 🗙		ľo	Open agenda for following rep
Place:	No meeting place selected	Writer:	No leader selected ×			
Subject:	No subject defined	Mailing-no:	Nothing selected		*	Manage report
			······	CD	1- 3- 1-	Manage chapters
Participants / [Distributors:				<u>S</u>	Manage participants
Name (w/o Title)	Function Company	Phone mobil present	Distr. temp.			Manage textblock templates
The period within If this period expi Next Meeting:	which objections may be raised to this P res without objection or opposition, the m Number: 002 Date: 16.12.2019	otocol shall be 4 working days from the date of inutes shall be deemed to have been accepted.	service.		Zoom facto	or O
					X	Close

The mask makes it possible to edit the data directly. For example, if you move the mouse button over the "Date of Meeting" field, this field will be bordered in blue. If you click on it with the left mouse button, you can also edit this field.

Further control data are displayed in blue in addition to the protocol content (e.g. the X on the right is for deleting leader / author).

On the far right you have a toolbox with further useful functions.

If I want to put our Mr. Doe as a leader, I can simply drag & drop this person into the leader field:

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(NT) Note (NT-INT) Internal Note (PM) Project Meeting (SC) Safety Check	PROMAN 1	Fraining			
Show complete c Show attachments Highlight empty Order reports descending	Jour Fix Building Jour	Fix No.: 001			
Item sorting:	Date of Issue:	09.12.2019	Pro	vject-no.:	2019/40 🧪
By chapter By itemcode By shortname	Date of Meeting:	09.12.2019	Do	cno.:	2019/40/BM/001 🖉
< >	Time:	from:	Ch	airman:	No thor selected 🗙
Project addressbook	Place:	No meeting place selected	Wr	ter:	No léader selected 🗙
Coards 0	Subject:	No subject defined	Sy	mbol: No a	author sign selected
Main view Employee view Groups	Participants / D	vistributors:		mg-no:	Nothing selected
All project partners	Name (w/o Title)	Eunction	Phone mobil	present	Distr temp
All participants All project partners Pick filter Employees Company ▲ Employee s ▲ Employee Fu new Company Doe (PM) Project S Pick filter	The part a within a mis period expir	which objections may be raised to t es without objection or opposition, Number: 002 Date: 16.12.2019	his Protocol shall be 4 working the minutes shall be deemed to	days from the date of s have been accepted.	ervice.

or as participant and distributor.

					PRO MAN
PROMAN '	Training	9			
lour Eix					
		001			
Building Jour	FIX NO.:				
Date of Issue:	09.12.2019)		Project-no.:	2019/40 🥒
Date of Meeting:	09.12.2019)		Docno.:	2019/40/BM/001 /
lime:	trom:	. to:	-	Chairman:	Doe X
Diago:		o diace selected		wwriter.	No reader selected 👗
Place:	No meetin	t defined		Symbol	No author sign selected
Place: Subject:	No subject	t defined		Symbol: Mailing-no:	No author sign selected Nothing selected
Place: Subject:	No subject	t defined		Symbol: Mailing-no:	No author sign selected Nothing selected
Place: Subject: Participants / E	No subjec	t defined		Symbol: Mailing-no:	No author sign selected Nothing selected
Place: Subject: Participants / E Name (w/o Title)	No subject No subject Distributors	Company	Phonemobil	Symbol: Mailing-no:	No author sign selected Nothing selected present Distr. temp.
Place: Subject: Participants / E Name (w/o Title) Doe Pezzei	No subjection Distributors Function PM	Company new Company PROMAN	Phonemobil +431234 23 +43 1 4780567	Symbol: Mailing-no:	No author sign selected Nothing selected

In the participant distribution list, you can change the status for present, distribution list (Distr.) or present temporarily (temp.) simply by clicking on the bead. With the blue hand (far right) you can change the position of the person. You can correct the personal data with the pen (e.g. function, telephone number, etc.)



5.1. Create and edit report items

In the same mask you can also edit the report items below the cover sheet.

In our example there are already chapters. These were taken from the example project.

Of course, these can be changed or deleted. There is a "Edit chapter" button in the toolbox for this purpose.

A report item can be created in the chapter "general" using "+" at the right margin of the chapter heading.

Name (w/o Title)	Function	Company	Phonemobil	present	Distr.	temp.	
Doe	PM	new Company	+431234 23	•	•	0	J 🖬 🖊 🗙
ezzei		PROMAN	+43 1 4780567	•	•	0	🖉 🖾 🗡 🗙
If this period exp	Number: 002	ection or opposition, th	e minutes shall be deemed to h	ave been accepted.			
	Date. 10.	12.2015					
tem	Subject	12.2013		cr Responsible		Deadline	
tem To no chapte	Subject	12.2013		cr Responsible		Deadline	+
tem To no chapte)1	Subject er assigned Genera	linformation		cr Responsible		Deadline	+
tem To no chapte 01 01.01	Subject er assigned Genera Safety	l information and security		cr Responsible		Deadline	+++++++++++++++++++++++++++++++++++++++

The report item heading, called item short, and report item content can be opened with a left mouse click:

01	General information	4
9001.001	heading / item short	open
	🍬 🛷 두한 🛅 & 🕩 📫 두한 🗮 🗄 는 🛲 🔻 🖷 두 🖬 두 🖬	
Etc	🖏 B <i>I</i> <u>U</u> S X ² X ₂ A ·	
+ Attri	E X · · · 1 · · · 2 · · · 3 · · · 4 · · · 5 · · · · 6 · · · · 7 · · · 8 · · · △	
4		

Statuses:

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pen		Zoom factor
DauerInfo_Standard	permanent Info	Will be taken to the next report
erledigt_Standard	completed	Will not be taken to the next report
inbearbeitung_Standard	in progress	Will be taken to the next report.
Info_Standard	one time info	Will not be taken to the next report.
offen_Standard	open	Will be taken to the next report
storniert_Standard	canceled	Will not be taken to the next report.
Wiedervorlage_Standard	Resubmission	Will be added at the defined date to a report in the future.
zurückgestellt Standard	deferred until	Will be added at the defined date to a report in the future.

This list of statuses can be implemented as desired in the report collection.

The status also determines whether a report item is included in the next report.

According to the description, an open task is taken to the next report. On the other hand, a completed task is printed in the current report, but is not included in the next report.

Use this feature to structure your report so you don't have to painstakingly delete points as in Word.

You can put a person in charge by dragging the desired person into the report item:

By chapter By itemcode By shortname			
•			
Project addressbook 🗆 म 🗙	Item	Subject	cr Resp
Search P	To no chap	ter assigned	
Main view Employee view	01	General information	
Groups	001.001	heading / item short	
All project partners	9001 / 09.12.2019	There is no content for this item	_
All participants	E	gebnis: No ter set	
	Co	mment No commentary for this item	
All project partners 🔻 Pick filter 👻		ibutes: No attributes assigned	
Employees			
Company 🔺 Employee s 🔺 Employee Fu			
new Company Doe (PM) Project	01.01	Safety and security	
PROMAN Pezzei			
	01.02	Aauthorisations	

Then you can also set a completion date by clicking on the date field to the right of the currently displayed person:

	open		
D Completed to be	•	초 🗟	×
Begin <mark>targ</mark> et	-		
Begin actual	.		
Completed is	Ŧ		
Show date			



01	General information		+
[@] 001.001	heading / item short		open
4001 / 09.12.2019	item content	Doe	30.01.2020 💄 🚞 🗙
Erg	gebnis: No text set		
Cor	^{nment:} No commentary for this item		
+ Attri	butes: No attributes assigned		
01.01	Safety and security		;≓ "⊾

More report items can be created with the small or large plus below the item:

The small plus symbol creates another sub report item. The big plus icon creates a new report item in the same chapter.

5.2. Pictures and attachments

Images and attachments can also be inserted into the report item using drag & drop:

Using drag & drop, images and attachments can simply be dragged into the desired item:



These images can then be further edited with the pen:

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e.g. to highlight damage.

There is no limit to the number of images per point.

If you want to insert a plan, for example, you can simply copy the desired image section from a DWG or PDF plan file using the Windows tool "Snipping Tool" and paste it with the insert button (far right in the image).





A pin can be placed directly with the pen at the desired position.

Similarly, PDF documents can also be added to the report. A legend of the attachments can be created automatically.

The PDF documents are automatically added to the PDF file according to the report and are stamped with the corresponding report item number, e.g.



We have added the following attachments to the point:

This PDF is attached after the protocol and stamped with the point number 001.001 in yellow:

PROMAN X License:	000/A1 PROMAN							20	019/4	0/BI	N/0 0	1																Pa	ige:	2/2			
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6. Print report (PDF)

When your report is finished, you can simply create a PDF using "Print report as pdf":

Training : Project addre	essbook Central addressbook (BM) Ri	eport 001: Report editor X			Toolbox	
					Ô	Create new report item
					0	Create new report item and open de
Item	Subject	cr Responsible	Deadline		0	Import report items
To no chapt					0	Load report items
01	General information			+		
001.001	heading / item short		open		\mathbf{x}	Send e-mail
4001/09.12.2019	item content	Doe	30.01.2020	3.73 ×	8	Print report (Print-Preview)
-					-	Print report as pdf
Out	tcome: No text set				•	Print report as rtf
and the second second			1		8	Print report as xlsx
19.42			Hand I		5	Prepare for meeting
4 Par					ľo	Open agenda for this report
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Alternatively, you can send the reports by e-mail. More details can be found in the following chapter.

7. Print out the report and send it to the distribution list as an e-mail

With the function "Send e-mail" the following is automatically carried out:

- PDF output with attachments
- Standard subject and text for your email
- Distribution list automatically filled according to the distribution list
- The finished e-mail will be opened automatically in your e-mail client (e.g. Outlook) to check it before you can send it.

The first step for this is the function "Send e-mail":





Subject as well as e-mail text will be loaded with the predefined settings and text:

Send e-mail - Report	t: BM//001					-		×
Project shortname	2019/40	Report collection short name	3M	Report code	001			
Meeting date	12/9/2019	Subject						
Pdf save option	Temporary Save as	Filepath O:\Schulung\Schulung	g\Beispielprojekt\2019_40_BN	4_001				
Textpreview								
• Use textblocks			O Use freetext					
E-mail subject Projekt: I	PROMAN Training, Sitzung: Building Jour	Fix, Nr. 001 vom 09.12.2019			Edit default subj	ject		
Dear Project Me attached you car The next meetin Best Regards	mbers, find the minutes of the meetin g will take place on 16.12.2019.	g no. 001 of 09.12.2019.					÷	
▲ E-mail text								
Default e-mail textblocks email-Bericht					Available e-mail tex email-Bericht email-Agenda	tblocks		
					Manage	textblock templates		
2	Distributor	1 Attachi	ments	X Close	Open e-mail	Direct se	nd	

The subject is created using macro fields ("Edit default subject" function). For example, the session date and session number can be filled automatically.

The same applies to the e-mail text.

The software checks if all persons in the distribution list also have an e-mail address.

👤 Distributor 🌒 🖉 Attachments 🖾 Close 🖾 Open e-mail 🖾 Direct send							_			
	2	Distributor	00	Attachments	×	Close	20	Open e-mail	\Join	Direct send

In this case you will see the following symbol on the distributor list, i.e. one or more persons do not have an email address. If you click on the button, this data can still be corrected temporarily.

If attachments have been moved or deleted, you will also be informed and have the possibility to correct them before sending.

With the button "Open e-mail" the PDF file of the protocol is created, stored and the e-mail is filled with all data.

Software for Project Management and construction project management office@proman.at



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File	Message	Inser	t Opt	ions Forma	at Text	Review	Developer
abc		= 123	A))			að	AT
Gramm	i & Thesaurus 1ar	s Word Count	Read Aloud	Check Accessibility	Smart Lookup	Iranslate •	Language
	Proofing		Speech	Accessibility	Insights	Lang	Juage
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PROMA	N Software Gmb						

8. Further functions

The application also supports many other functions:

- Search and reporting to find or to print out sub-areas of protocols
- Agenda and invitation
- Prepare meeting with your own comments for each item
- Live logging with beamer view
- Import points from external cross-referenced sessions
- ..



9. Layout and print settings

Further information on the possible layouts and print settings can be found directly in the training documents of your version:

https://www.proman.at/proman x releases/currentversion/

If you have any questions, our team at the hotline will be happy to answer them:

support@proman.at

International or AT +43 1 478 05 67

from Germany 0800 589 0129

We are happy to support you.

Your PROMAN Team