PROMAN Software GmbH Software for Project Management and construction project management



PROMAN meeting report

QuickStart:

- Create project
- Creating Addresses
- First protocol
- Report printing
- Sending email

Version 4.2

December 2022

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1. General information

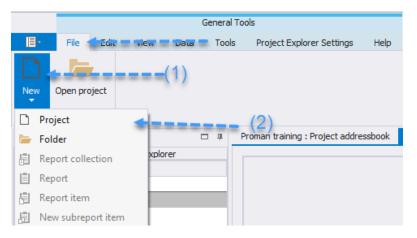
In this document you get all necessary information necessary to create your first project successfully. This includes:

- Creating a project
- Transferring the print settings from another project (template project)
- Creating addresses
- My first collection of reports and minutes
- Printing and emailing of the protocol

All descriptions are valid from software version 4.2.22 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 left mouse button click on the menu File / New / Project to create a new project.



This opens the following mask:

New project	x
Basic project information Enter all needed information for a new project within a few step possibility to create your first protocols.	After that you have the
Project shortname * 2022/39 Project longname * Proman training ✓ Copy structure/templates from existing project at Edit project details after creation	r creation
* 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.
- Edit project details directly after project creation (optional)
- Apply project structure/templates... (optional)

Please select " Copy structure/templates from existing project after creation".

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

				-	General 1	ools		Project (Copy Tools	
H۲	File	Edit	View [Data	Tools	Project Explorer Settings	Help	Main		
E Save	X Close	Choose	project							
Ма	in	F	roject							
Project V					- *	Proman training : Project addre	essbook	2022/39:	: Project copy 🛛 🗙	
0	Ref	fresh pro	ect-explorer						Project gener	al data
⊟ (2022	(39) Prom	an trainin	2						Project addre Attributes	sses Employee Functions
									Continue by selecting a project from the toolbox	

This allows us 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.
 - chapter structures
 - point status
 - print settings

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

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

We can also copy these settings and data after we 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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	Project Copy Tools	
File Edit View Data Tools Project Explorer Settings Help	Main	
Choose project.		
ect View	2022/39: Project copy 🗙	
Refresh project-explorer		
ACTION TO ANY CALLOS	Continue by selecting a project from the toolbox	Project addresses Project addresses Attributes Company and Engloyee Functions TextBlods Report collections

Select the source project from the drop-down menu in the upper left corner. In this example, we use the sample project as a source for our template data.

In the following mask we can adopt individual areas of the template (e.g. logo only), however in the target project we could then remove or modify unused elements.

No item contents are carried over with this function!

	ar roos Project copy roos		
File Edit View Data Too	ols Project Explorer Settings Help Main Quick Selection		
Project View Refresh project-explorer	test : Project addressbook (test) test ×		
 Remean project explores 			
∃ (test) test	Template project	Copy all 🕨 🕤	Current project
(test) test	Client	Copy 🕨 🕤	
	Project author	Copy 🕨 🕤	
	Project address	Copy 🕨 🕤	
	Header		Header
	PRO		i kududi
		Copy 🕨 🔊	No image data
	MAN		
	Text		Text
		Copy 🕨 🔊	1
		*	·
	Footer		Footer
	No image data	Сору 🕨 🛇	No image data
	Text		Text
		Copy 🕨 🔊	
Project addressbook 🗆 🗦 🛪			

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2.1. Change Logo

This is done in the "Manage project" mask, which can be reached via the menu bar (1) or via the right mouse button on the project (2).

PROMAN Phenix							G	eneral To	ols		
	General Tools		E٠	File	Edit	View	Data	Tools	Project Expl		
File Edit View Data	Tools Project Exp	lorer Setting			凬	. 18		L			
oject Folder Report Collection + Report item		(1)	Project	Folder	Report collection Edit	t Repo	ort Reportitem		(2)		
Manage project			Project V	iew		1	- 4 F	PROMAN t	training : Proje		
Project rightsmanagement	OMAN training : Proje	ct addressb	C	Refres	n project-	explorer		Main view	Employee		
Manage project attributes	lain view Employee	view					earch				
Show stored documents for Project	arch	arch				(Ex.Proj) PROMAN training (DE) DE Reports Manage p					
Addressbook synchronization	ort	ort Long			iz	Project r	ightsman	agement			
Copy project structure/templates	Holzer Bau	Holzer Baug	Izer Baug 🗄 (AN-Int) Aktennoti: Project a				ject addressbook				
Delete project						Search and Reporting					
	Kastberger	Ing. Franz I		Bautageb Monatsbe		Manage project attributes					
)]) Projekt		Show sto	ored docu	ments fo	or Project		
				Ko) Baub ENG rep	-	Address	book synd	:hronizati	ion		
				сиотер	JILS	Copy pr	oject strue	cture/tem	nplates		
						New pro	ject				
						New fol	-				
						Delete p	roiect				
							roject att	ributes			
							- Jacobie				

On this page we can change the areas header bar / footer bar / project image. We could also change the project name.

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

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

General Tools		Proje	ect Tools				
File Edit View Data Tools Project Explorer Set	ings Help	Project	Attribute				
Close Save Save Save Active close Project							
Project View 🗆 🕸	PROMAN tra	sining : Projec	ct addressbook	Ex.Proj: Manage project 🛛 🗙			
C Refresh project-explorer							
(Ex.Proj) PROMAN training	Project sh	nortname / ni	umber *	Ex.Proj	Projectcode dient		
(DE) DE Reports	Project lo	ngname *		PROMAN training			
(AN) Aktennotiz	Ass	ociations					
(AN-Int) Aktennotiz - Intern	Client			Select a projectbased company			
(BAUB) Baubesprechung ÖBA	Project a	uthor		Select a projectbased company			
(BT) Bautagebuch (PB) Monatsbericht	Project A	ddress		Select a projectbased company			
(PROJ) Projektbesprechung	A Des	scription					
(SiGeKo) Baubegehung	Brief des	cription		Beispielprojekt			
(ENG) ENG reports	Descriptio	n					
	Header	r Footer		RO	Height in mm Width in mm O Alignment	33 C 50 C Revert to original size	Spacing left
			IV				
	Hon	Load in		From dipboard X Remove Image			
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Central addressbook 🗆 0. 🛪		io Redo		Copy Paste Special B I U U 5 5 X ² X ₂ A		-	
C Refresh data		Common		oard Font	P	Paragraph A Editing	

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3. Creating Addresses

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

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

If we create the addresses centrally, they can be used throughout multiple projects.

3.1. Creating Addresses Centrally

The central address management can be accessed under tool / show central address book (1):

	General Tools				Addressbook T	Tools						
File Edit View Data	Tools Project Ex	plorer Settings Help	Home Cor	mpany Emplo	oyee Print	Attribute a	and Stroted Doo	cument				
💣 Settings 🗋 Search and Reporting	Show Project cockpit	Show central addressbo	ook 🗲 Restor	e window position	ns 📑 Temp	olate managem	ent 🔻 💉 Ma	anage cei				
Project View 🗖 म	PROMAN training : Proj	ect addressbook		(1)								
C Refresh project-explorer	Main view Employe	Main view Employee view										
3 (Ex.Proj) PROMAN training	Search											
∃ (DE) DE Reports	Short	Long	Address	Country	City	Postcode	State	Homepa				
(AN) Aktennotiz	🗉 Holzer Bau	Holzer BaugesmbH	Weizer Stra		Gleisdorf	8200						
🗄 (AN-Int) Aktennotiz - Intern	🗄 Busch & Czerny	Busch & Czerny, Ingenie	St. Peter H		Graz	8010						
(BAUB) Baubesprechung ÖBA		Ing. Franz Kastberger, T	Lahnweg 17	1	Leibnitz	8430						
D (DT) Deutereleure					-							

Then another tab "Central Address Book" opens:

																			_
					General [•]	Tools								Addre	essbook Tools	1			
III	File	Edit	View	Data	Tools	Project Expl	orer Settings	Help	Home	Company	Emplo	yee	Print	Synchroni	ze Attrib	ute and Stroted [Document	Show usages in	projec
$\phi^{\hat{\Phi}}$	Q		=			5				2,									
Settings	Search a Reporti		how Project cockpit		/ central essbook	Restore window positions	Template management		nage central attributes	Administratio	n								
			Tools						Manage										
Project Vi	ew			а ф.	Example	Project PROMAN	: Project addre	ssbook	Central ad	dressbook >	<								
C	Refresh	projec	t-explorer		Search .														
🗆 (Ex.Pro	oi (1)) orc	man tr	aining	_	Short		ong		Address	Country		Dity	P	ostcode	State	Homepage	VAT		Post
			un nig		🕀 test	1	test												
					🗄 new	company	new company												
			Intern		E Prom	an	Proman												
E (BAU																			
⊞ (ВТ) В			-																
	4onatsber	icht																	
E (PRO	J) Projekti	pespred	chung																
E (SCA	Val Paulaa	cohuny	_																

• Addresses created via the Central addressbook are highlighted in yellow to distinguish them from those created via the Project Address Book.



Addresses can be created with the buttons in the toolbox (1) or with the right mouse button at the desired company:

					Ger	neral Tool	s					
	File	Edit	View	Data		Tools	Project E	Explo	rer Settings	Help	Hom	
Create Company	Edit Co	ompany Compar	Delete company	Comp funct								
Project Vie	w		I	– 4	Ex	ample Pro	oject PROI	MAN	: Project addre	essbook	Cent	
0	Refresh	n project-	explorer	_	Se	arch						
🗆 (Ex.Pro	i (1)) pr	oman trai	nina	_	Sh	ort			ong		Add	
	E Report				Ŧ	test		t	est			
	ktennoti				÷	new com	pany	n	ew company			
1 1 1		notiz - In	tern		ŧ	Proman		P	roman			
) Baubes autageb	prechung uch	ÖBA	(2)	-							
🕀 (PB) M	onatsbe	richt					*	Create Company				
		besprech	ung					Edit	Company			
	o) Baube ENG repo	egehung orts						Crea	te Employee			
								past	e employee			
								Dele	te company			
								Assi	gn company	attributes		

Each person must be created within a company.

To do this, we must first create a company. With the button "Create company" the following mask opens:

	company]
		×							Add phonenumb	ber		
							Туре	Number	1	Vote	Is Default	
	No image data			Drop outlook contact h	ere		Main	▼ +43 12334			۲	>
			Inser	t businesscard (*.vcf) fro	m clipboard							
Short *	New company											
.ong *	New company Ltd											
Street												
ostcode		Cit	у			Ŧ						
Country	Choose country					-						
State						-						
Post Box		Pos	st Box P.C.									
lomepage										ote)
/AT							Main em	• office@newcompany.	com			
econdary site of	No image data No image data Drop outlook contact here Insert businesscard (*.vcf) from dipboard New company Ltd Insert businesscard (*.vcf) from dipboard Insert businesscard (*.vcf) from dipboard											
Departments	Shortname	Longnam	ie		0	Add						
				y attributes			Add functi	ion		Manag	e functions	
	Attribute		Assign compan							Manag		
Attributes	Attribute		Assign compan							Manag		
ıttributes	Attribute		Assign compan							Manag		



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

Example Project PROM	AN : Project addressbook	Central address	sbook 🗙								
Search				(1)							
Short	Long	Address	Country	City	Postcode	State	Homepage	VAT	Post box number	Post Box Postcode	Disabled
🕀 test	test										
new company	new company										_
🗄 Proman	Proman Software GmbH	T									I I I

The "Short" field is used for a commonly known short form of the company, e.g.: PROMAN for Proman Software GmbH.

Afterwards, an employee is created via the menu bar (1) or with the right mouse button on a company (2):

					General	Tools					
E٠	File	Edit	View	Data	Tools	Project Exp	lorer Settings	Help	Home	Company	Employee
0			X	3		<u></u>					
Create Employee		mployee Employ	Delete employee ree	Emplo funct		Copy Employees					
Project Vie	ew	(1)) (— —	Exampl	e Project PROMA	N : Project addr	essbook	Central ad	dressbook 🤇	ĸ
<i>C</i>	Refres	n project-	explorer		Search						
				_	Short		Long		Address	Country	City
		oman trai	ning	_	🗄 test		test				
	E Report Aktennot				🗄 new	company	new company				
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		notiz - Ini	torn		E Prom	nan	Proman Softwa	re GmbH			
		prechung							Cr	eate Compar	iy
	Bautageb								Ed	it Company	
	/onatsbe						(2)			eate Employe	
		besprech	ung				. ,				
E (SiGel	<o) baub<="" td=""><td>egehung</td><td>-</td><td></td><td></td><td></td><td></td><td></td><td>pa</td><td>ste employee</td><td>2</td></o)>	egehung	-						pa	ste employee	2
E (ENG)	ENG rep	orts							De	lete compan	у
-									As	sign compan	y attributes

This opens the following mask:

🔀 Edit empk	loyee for company new	Company Ltd									- 0	×
	No image data	X	Drop outlook contact here or click	to insert vCa	ard (*.vcf) from clipboard		Phone Phone *	Number	Add phonenumbe	er Comment	Is Default	x
Short * First Name Lastname Abbreviation	Doe John Doe John			*	Edit longname							
Gender Title Title Intern Department	Male	vailable for this emp	Name Suffix			• 			20000	1		
	There are no functions availe			*	Manage functions		Туре	E-mail	Add e-mail addres	s Comment	Is Default	
	Short Long PM Proje	ect management			Is Default	x	Work *	john.doe@new			•	×
Attributes			X Assign employee attributes									
	Attribute		Value									
* Required	I fields Switch	to central	Last modified by: 2 Roland.Pezzei (8:5	1 PM 12/9/20	19)	×	C	lose	Ľ	Save &	close	



It is recommended to fill in all fields highlighted in red for the employees.

In the "Short" field, please enter a commonly known short form of the person (e.g. last name). This field must be unique per company. (There can be no duplicates).

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

Additionally, the complete Outlook address book can be synchronized if Proman is installed directly on the computer, however Outlook also has to be 32bit. Further information can be obtained from the hotline.

3.2. Use addresses in a project

Centrally created addresses can be activated in a project by dragging & dropping. 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, the same thing can also be done by right-clicking on the address:

Project View	— #	Example Project PROM/	AN : Project addressbook	Central addres	sbook			Central addressb	ook	□ # ×
C Re	fresh project-explorer	Main view Employe	e view					C	Refresh data	
- (E., David (43)	ana ana kasisina	Search						Search		c
(Ex.Proj_(1)) (DE) DE Repo		Short	Long	Address	Country	City	Pr			
 (DE) DE Rept (AN) Aktenn 		Holzer Bau	Holzer BaugesmbH	Weizer Stra	Country	Gleisdorf	8	Short	Long	
	ennotiz - Intern	⊞ Busch & Czerny	Busch & Czerny, Ingenie			Graz	8	⊡ test	test	
	esprechung ÖBA	Kastberger	Ing. Franz Kastberger, T			Leibnitz	8	new comp	new company	
 ⊕ (BT) Bautage 		Kastberger Flughafenbetrieb	Flughafen BetriebsgesmbH		AT	Graz	8	Short	First Name	Lastr
(PB) Monatsl		Leitner	DI Hans Leitner, Ziviltech		AI	Wien	1	Doe	John	Doe
(PROJ) Proje		Planconsult	Planconsult GesmbH	Nussdorfer			10	A		Add to project
 ① (SiGeKo) Bau 						Wien		E Proman	Proman Software G	mbH
(ENG) ENG re		GPS	Gesellschaft für Projekts	Unterer Plat		Graz	8	1		
- (,		ERLAUCH	ERLAUCH							
		PAC-PS	PAC-PS							
			Sportverein Wienerwald							
		PROMAN	PROMAN Software GmbH	Lienfelderg	AT	Wien	1			
		Проман Софтваре	Проман Софтваре	Пример ули		Београд	1			
		⊞ test	test							
		New Company	New Company							
Central addressb	oook □ # ×									
C	Refresh data	/								
Search	۶									
Short	Long	1								
⊡ test	test	1								
⊡ new comp	new company	6								
Short	First Name Last									
Doe	John Doe									
	Damas Caffrida Carbi									
Proman	Proman Software GmbH									

4. Rename Report Collection

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

If their names are not suitable, we can easily rename them. We simply right-click on the desired report collection then on "Manage report collection" (1):

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Project View	ф П	Example Proj	ject PROMAN : Proj
C Refresh project-ex	plorer	Main view	Employee view
 (Ex.Proj_(1)) proman training 		Search	
(DE) DE Reports		Short	Long
		🗄 Holzer Bau	u Holzer
🗄 (AN-Int) Aktennotiz - Intern		🗄 Busch & C	zerny Busch 8
 (BAUB) Baubesprechur (BT) Bautagebuch (PB) Monatsbericht (PROJ) Projektbesprec (SiGeKo) Baubegehung (ENG) ENG reports 	Manage report Edit next agend New report Manage report Manage chapte	da -codes ers	Fr. hai cor ells AU
(1)	Manage textble Delete report co		tvi MA
	Assign reported		utes ^{Nai}
	Show stored do	ocuments for (Collection Co

In this case we want to change the "Building Meeting" to "Building Jour Fix":

				(General To	ools		F	Report Collection Manager Tools
II۰	File	Edit	View	Data	Tools	Project Explorer Sett	ngs l	Help	Main
H Save	Save & close	Close							
Project Vi	iew				— #	Proman training : Project	addressb	book B	M: Report collection manager 🗙
C	Re	resh proj	ect-explo	rer					
■ (2022/ ■ (2022 ⊕ (BM)	./39) Prom	an trainin				Collection shortname Collection longname		James Fire	
						Collection totgname	building J	Jour Fix	
						Collection are		_	
						Description			
							Conti	tinuous pro	tocol
						Protocoltype	O Memo	0	
							One	time repor	t
						Print language	German		
						✓ Link defau	t setting:	is to last R	eport, i.e. changes in the last report for textblocks, documentnames, eMail- and agenda-settings will be saved automatically to this

For this we 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":

Home Sort An	nd Hilter		
Project View	— 4	Proman traini	ng : Project addressboo
C Refresh project-explore	er	Main view	Employee view
 (2022/39) Proman training 		Search	
😑 (2022/39) Proman training		Short	Long
🗄 (BM) Building Jour Fix			
	Manage	report collection	on
	Edit next	agenda	
	New repo	ort	
	Manage	report-codes	
	Manage	chapters	
	Manage	textblock temp	plates
	Delete re	port collection	
	Assign re	portcollection	attributes
	Show sto	red document	ts for Collection

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

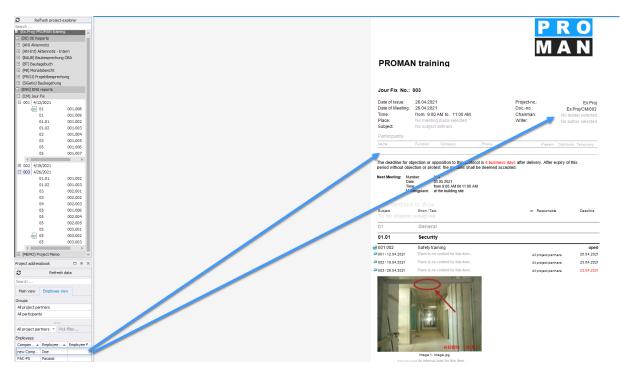
(CM) Report 001: Protocol view) ×					Ρ	R	0	
	PROMA	N train	ning		P M	Α	Ν	
	Jour Fix No.: Date of Issue: Date of Meeting Time: Place: Subject: Participants:	12.04.202 12.04.202 from: 9:00	1 AM to: 11:00 AM ng place selected		Project-no.: Docno.: Chairman: Writer:		Ex.Proj roj/CM/001 Doe lor selected	
	Name	Function	Company	Phone	Present	Distributor	Temporary	•
	Pezzei Doe	PS	PROMAN new Company	+43 1 4780567 +181134526	:	:	00	×××
	period without ob Next Meeting: No Di Ti	jection or prot umber: 0 ate: 1 me: f eetingplace: a	pposition to this protoc test, the minutes shall 002 19.04.2021 from 9:00 AM till 11:00 AM at the building site	be deemed accepted		expiry of thi	s	-

The mask allows to edit the data directly. For example, if we move the mouse button over the meeting date (1), this field will be outlined in blue. If we click on it with the left mouse button, we can edit this field.

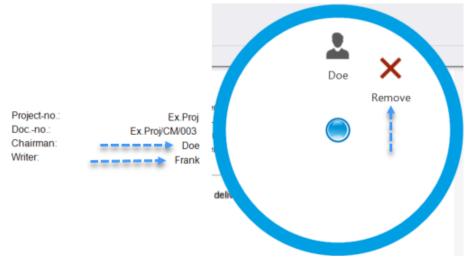


In blue there are further control data (2) in addition to the protocol content (e.g. to the right of the leader / author there is an X to delete the person).

If you want to set Mr. Doe as the leader (3), you can simply drag and drop this person into the Chairman field, or drag him into the Participant and Distributor fields or as participant and distributor:



"Leader" or "Writer" can be removed with the left mouse button:



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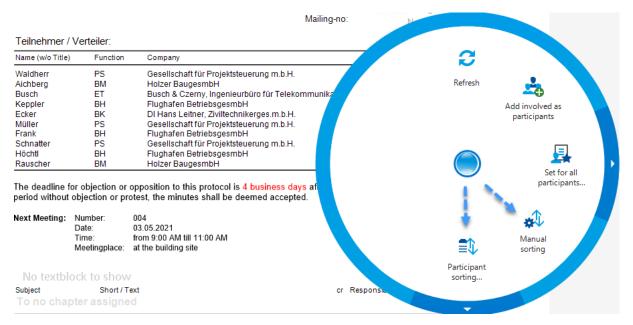
PROMAN training

Jour Fix No.: 001

Date of Issue: Date of Meeting: Time: Place: Subject:		1 AM to: 11:00 AM g place selected		Project-no.: Docno.: Chairman: Writer:			Ex.Pro roj/CM/001 Doe lor selected	l e
Participants:								
Name	Function	Company	Phone		Present	Distributor	Temporary	-
Pezzei Doe	PS	PROMAN new Company	+43 1 4780567 +181134526		•	:	000	××

In the participant distribution list, we can change the status for present, distribution list (Distr.) or present temporarily (temp.) simply by clicking on the bead.

By right-clicking on the participants list you can also edit participants sorting:



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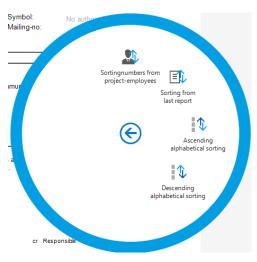
Manual Sorting:

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T A T A T A T A Waldherr GPS Aichberg Holzer Bau Busch Busch & Czerny Keppler Flughafenbetrieb ٠ • . Ecker Leitner • . Müller GPS Frank Flughafenbetrieb -* * Schnatter GPS • • Höchtl Flughafenbetrieb Rauscher Holzer Bau ОК ОК Cancel

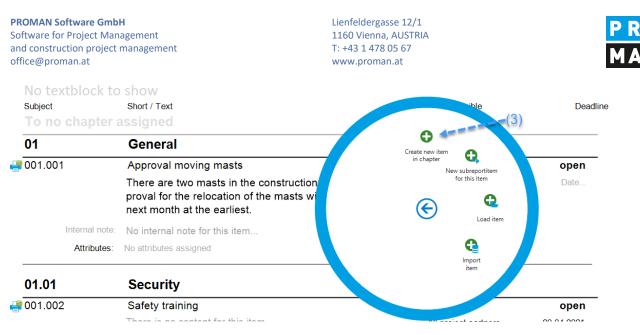
Automatic Sorting:



5.1. Create and edit report items

In the same mask, below the cover sheet, we can edit the protocol points right away. In our example, there are already chapters. These were taken over from the example project - they can be changed or deleted. In the menu there is a button "Edit chapter". An item in the General chapter can be created by clicking with the right mouse button on the chapter heading (1).

No textblock to	show				
Subject	Short / Text				Deadline
To no chapter			C		
01	General	-	Refresh	Lhange	
9 001.001	Approval moving masts	Comments		status	open
	There are two masts in the construction ar proval for the relocation of the masts will ta next month at the earliest.			ltem data	> Date
Internal note:	No internal note for this item			Ъ.	
Attributes:	No attributes assigned	Clipboard		Show history	
01.01	Security	Delete report iter	New	4	-(2)
9 001.002	Safety training				open



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

No textblock to Subject To no chapter a	Short / Text			cr	Responsible	9			D€	adline
01	General									
9 001.008	heading/ item short There is no content for this item	Home Insert	Review View	Arial B <u>IU</u>	- 10 - A 2 5 5 X ² X₂		Aa -	Paragraph	# #	
Internal note:	No internal note for this item	Common	Clipboard		Font		4			
Attributes:	No attributes assigned	► <u></u> 	1 • 2 • 1 • 3 • 1 • 4 • 1 • 5	. 1 . 6 . 1 . 7 . 1 .	۵،۱۰۵					4
9 001.009	There is no short for this item									
	There is no content for this item									
Internal note:	No internal note for this item									
Attributes:	No attributes assigned							V OK		Cancel

Statuses:

To no chapter	r assigned		
01	General		
9 001.008	heading/ item short		open
	There is no content for this	item	100 M
Internal not	R: No internal note for this ite	m	*
anceled	canceled	Will not be taken to the next report.	e
ompleted	completed	Will not be taken to the next report	
eferred until	deferred until	Will be added at the defined date to a report in the future.	
n progress	in progress	Will be taken to the next report.	
ne time info	info	Will not be taken to the next report.	8
pen	open	Will be taken to the next report	÷
	No date for this status:		v ak Cancel
9 001.002	Safety training		open
	There is no content for this	item All project partners	20.04.2021

This list of statuses can be applied 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 reports, thus avoiding having to painstakingly delete points.

We can assign a leader by dragging the desired person into the report item:

01	General
4 001.008	heading/ item short
	There is no content for this item
Internetote	No internal note for this item
Attributes:	No attributes assigned
	5
4 001.009	There is no short for this item
	There is no content for this item
Internal note	No internal note for this item
Attributes:	No attributes assigned
	• "
01.01	Security
001 000	Cafaty training
e 001.002	Safety training
	There is no content for this item

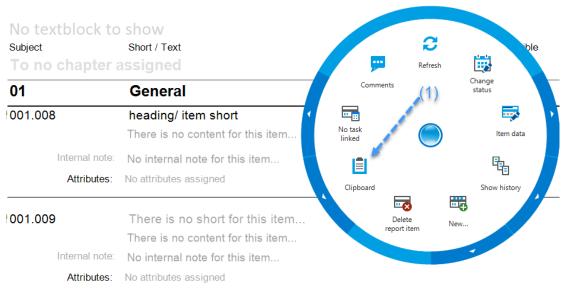
Then we can also set a completion date by clicking on the date field to the right of the responsible person:

General

		Completed to be
heading/ item short		Begin target 🔹 🔹 Open
There is no content for this item	Doe	Begin actual Date.
	Doe	Completed is
No internal note for this item		Reminder Vone ~
		Show Date
No attributes assigned		OK 😮 Cancel

5.2. Pictures and attachments

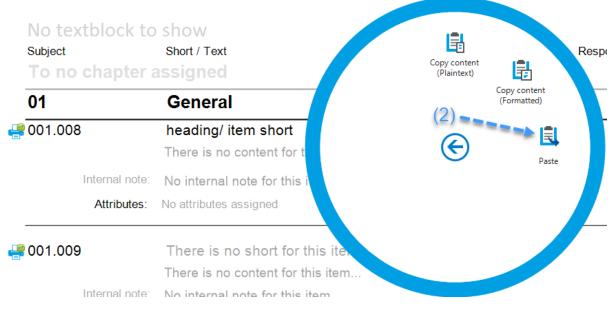
Images and attachments can also be added into the report item by right-clicking on the item and selecting Clipboard (1):



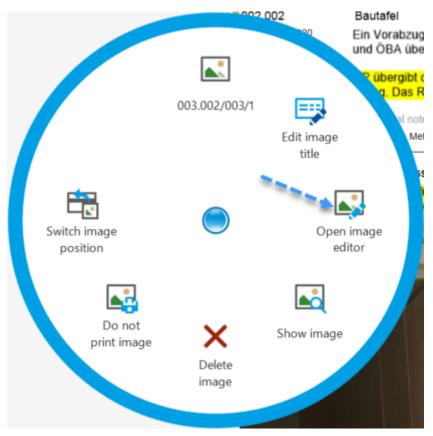
Lienfeldergasse 12/1 1160 Vienna, AUSTRIA T: +43 1 478 05 67 www.proman.at



Assuming that the desired attachment is already on the clipboard, just select paste (2) to have it added.

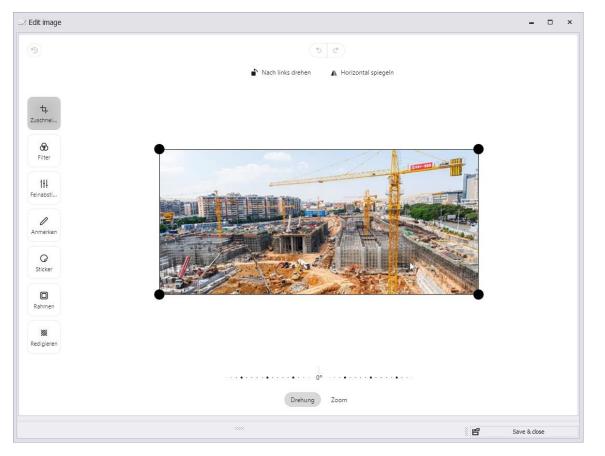


These images can then be further edited (e.g. to highlight damage) by right-clicking them and opening the Image Editor:



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TIP: If we want to add a plan, for example, we can simply copy the desired image section from a DWG or PDF plan file using the Windows tool "Snipping Tool" and paste it into the meeting report using the Paste button.

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 (the same as inserting an image).





In the editor a pin can be placed directly with the pen at the desired position.

In a similar manner, 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:

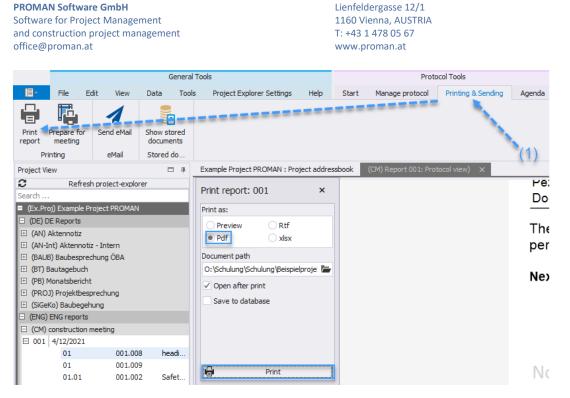
01	General		
001.008	heading/ item short There is no content for this item	Doe	open Date
Attr	Insge 1: Image.jpg annotekko internal note for this item biblets No attributes assigned uments:001.001/1 Residential Project.pdf	Image 2: Image.jpg	

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

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6. Print report (PDF)

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



Alternatively, we 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) for a check before sending it out.

The first step for this is the function "Send e-mail" (1):

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

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Subject as well as email text are loaded with the predefined settings & texts:

The subject (2) is created using macro fields ("Edit default subject" function). E.g., the session date and session number can be filled automatically with this.

The same applies to the text content of the e-mail (3).

The software adds all persons to the mailing list who have been defined in the participant/distributor list and who have an e-mail address. Further recipients can be added to the mailing list later (4). With the button "Open e-mail" the PDF file of the protocol is created, stored and the e-mail is filled with all the data.

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

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Cloud:

In our cloud version, there is an intermediate step that appears just like when you create a PDF document after "Open Email": an .eml file is created for the email, which you can download and open in Outlook.



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Here you can find all saved documents of the selected report collection.

You can either copy the document to the clipboard using the button (1) and place it on the desktop, for example, or create a link using the button (2) and open it in the browser and download the desired file.

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/

10. Proman Support

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.