PROMAN
Meeting Report Module version 4.0

Basic training 2021

training program

PRO MAN

training program

training program

PRO MAN

PRO MAN

Beispielprojekt
BESPRECHUNGSBERICHT
Baubesprechung ÖBA No.: 003

Date of Issue:	9/6/2016	Project-no.:	_BEISPIEL
Date of Meeting:	9/3/2016	Doc.-no.:	1010///BAUB//003
Time:	from: 9:00 AM to: 11:00 AM	Chairman:	Waldherr
Place:	GPS-Container	Writer:	Kastberger
Subject:	Bauablauf		

Participants / Distributors:

Name (w/o Title)	Function	Company	Phone mobil	present	Distr.	temp.
Waldherr	PS	Gesellschaft für Projektsteuerung m.b.H.	+43 6769182356	●	●	○
Busch	ET	Busch & Czerny, Ingenieurbüro für Telekommunikation	+43 316654345	●	●	○
Keppler	BH	Flughafen BetriebsgesmbH	+43 6649898567	●	●	○
Ecker	BK	DI Hans Leitner, Ziviltechnikerges.m.b.H.	+43 69910203345	●	●	○
Aichberg	BM	Holzer BaugesmbH	+43 31124444241	●	●	○
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Müller	PS	Gesellschaft für Projektsteuerung m.b.H.	+43 31639222014	○	●	○
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Höchtl	BH	Flughafen BetriebsgesmbH	+43 3166789115	●	●	○
Kastberger	ET	Ing. Franz Kastberger, Technisches Büro HKL	+43 345284214	○	●	○
Rauscher	BM	Holzer BaugesmbH	+43 31124444212	○	●	○
Mattersberger	GP	Planconsult GesmbH	+43 6644223322	●	●	●

Die Frist zum Einspruch oder Widerspruch zu diesem Protokoll beträgt 4 Werktage nach Zustellung. Nach Ablauf dieser Frist ohne Einspruch oder Widerspruch gilt das Protokoll als anerkannt.

Next Meeting:	Number:	004
	Subject:	Planung
	Date:	9/10/2016
	Time:	from 9:00 AM till 3:00 PM
	Meetingplace:	GPS-Container
	Company:	Flughafen BetriebsgesmbH
	Address:	AT 8070 Graz Flughafenstr. 21

PRO MAN

Item	Subject	cr	Responsible	Deadline
PL	**Planung**			
BAUB 002.001	**Stilllegung Hydrantenleitung**			open
002 / 8/27/2016	Herr Mattersberger hat vorab eine mündliche Zusage über die Stilllegung der das Baufeld querenden Hydrantenleitung erhalten. Eine schriftliche Bestätigung durch die Gemeinde Feldberg muss abgewartet werden.		Frank Mattersberger	10/27/2016
003 / 9/3/2016	Die Stellungnahme der Gemeinde Feldberg ist noch ausständig.		Frank Mattersberger	10/27/2016
BAUB 002.002	**Bautafel**			open
002 / 8/27/2016	Ein Vorabzug des Bautafel-Layouts wird an Baufirma und ÖBA übermittelt.		Mattersberger	9/3/2016
003 / 9/3/2016	GP übergibt das Layout in der nächsten Baubesprechung. Das Rendering musste neu erstellt werden.		Mattersberger	9/3/2016
BAUB 003.002	**Helmtragepflicht**			one time info

Image 1: 2bd4da73-bbee-4a80-aa0b-6df423b97d40.jpg   Image 2: 2c477b80-f1b9-486c-b19a-2423bb219742.jpg

	Auf die Einhaltung der Helmtragepflicht wird dringend hingewiesen!		All project partners	
BAUB 003.003	**Mängelerfassung**			open
	Als Beispiel für die Erfassung von Mängel mit dem integrierten Bildbearbeitungswerkzeug.		Aichberg	

Terms and data structures

- Create and manage different projects

- Projects can contain multiple report collections

- These report collections represent the meeting groups (e.g. construction meeting, client meeting, project meeting, jour fixe, memo,…)

- In the report collections host the reports aka meetings.

- The reports are structured in report items
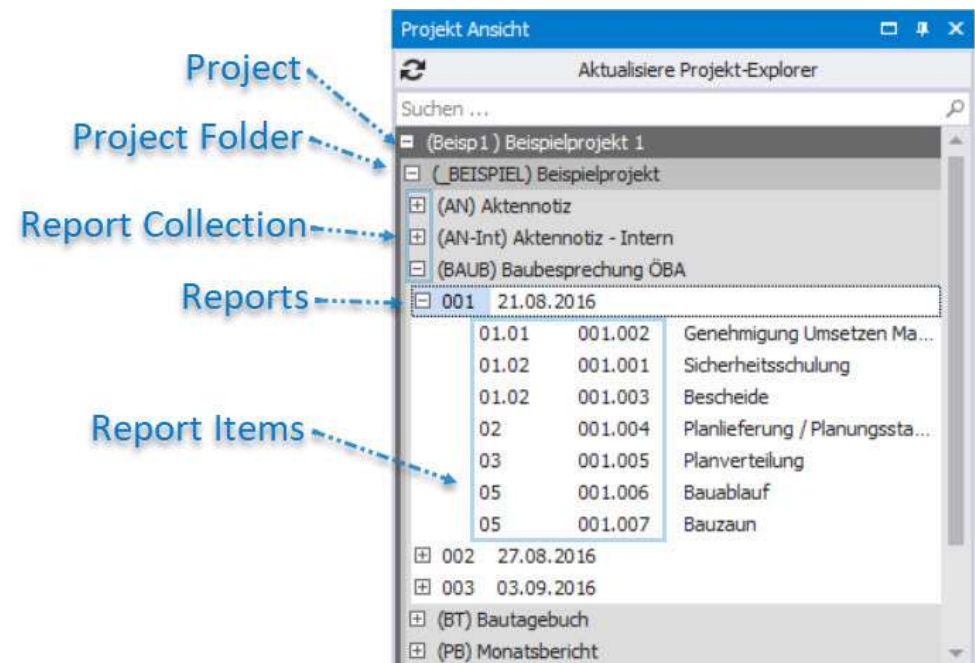
1. Menu control and masks

When PROMAN X is started the "Open project" dialog opens.

You can open a project by double-clicking on it or search for a specific project *(3)*

Important projects can be marked with a favorite star *(2)*. If checked only the favorites are displayed.

To switch the to main view and show all projects click Show only favorites *(1)*
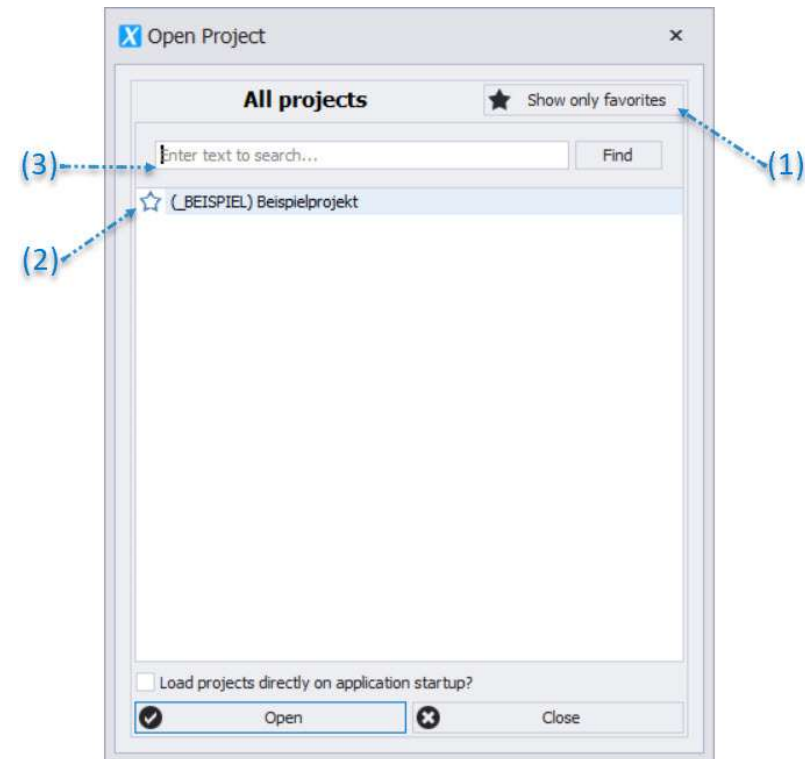
1.1 menu control and masks

Control the application using:

- Right mouse klick *(1)*

- Upper menu items *(2)*

- Toolbox *(3)*
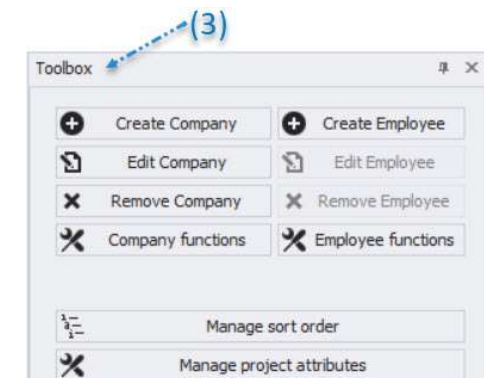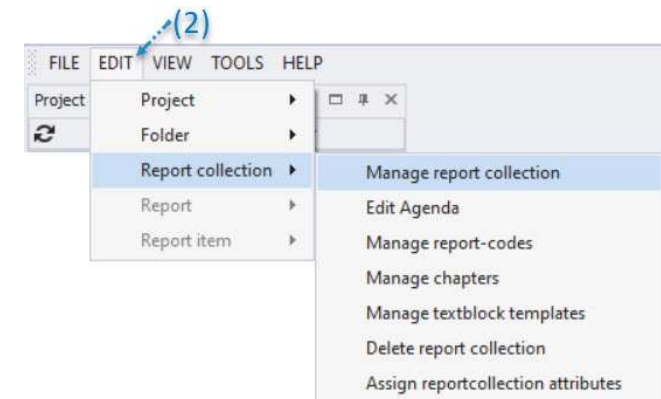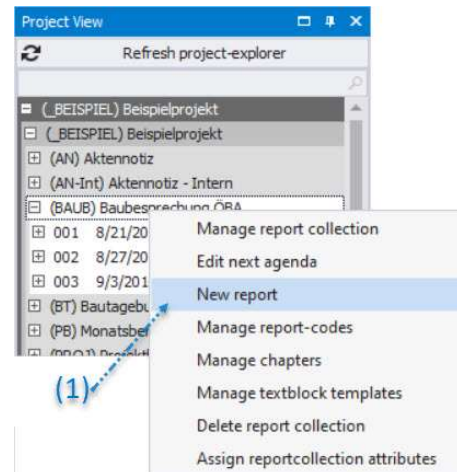
1.1 menu control and masks

(1) Project tree with all report collections and reports

(2) Address data (central or in the project, visible by the heading)

(3) Project addresses

(4) Toolbox with the most important functions of the current mask
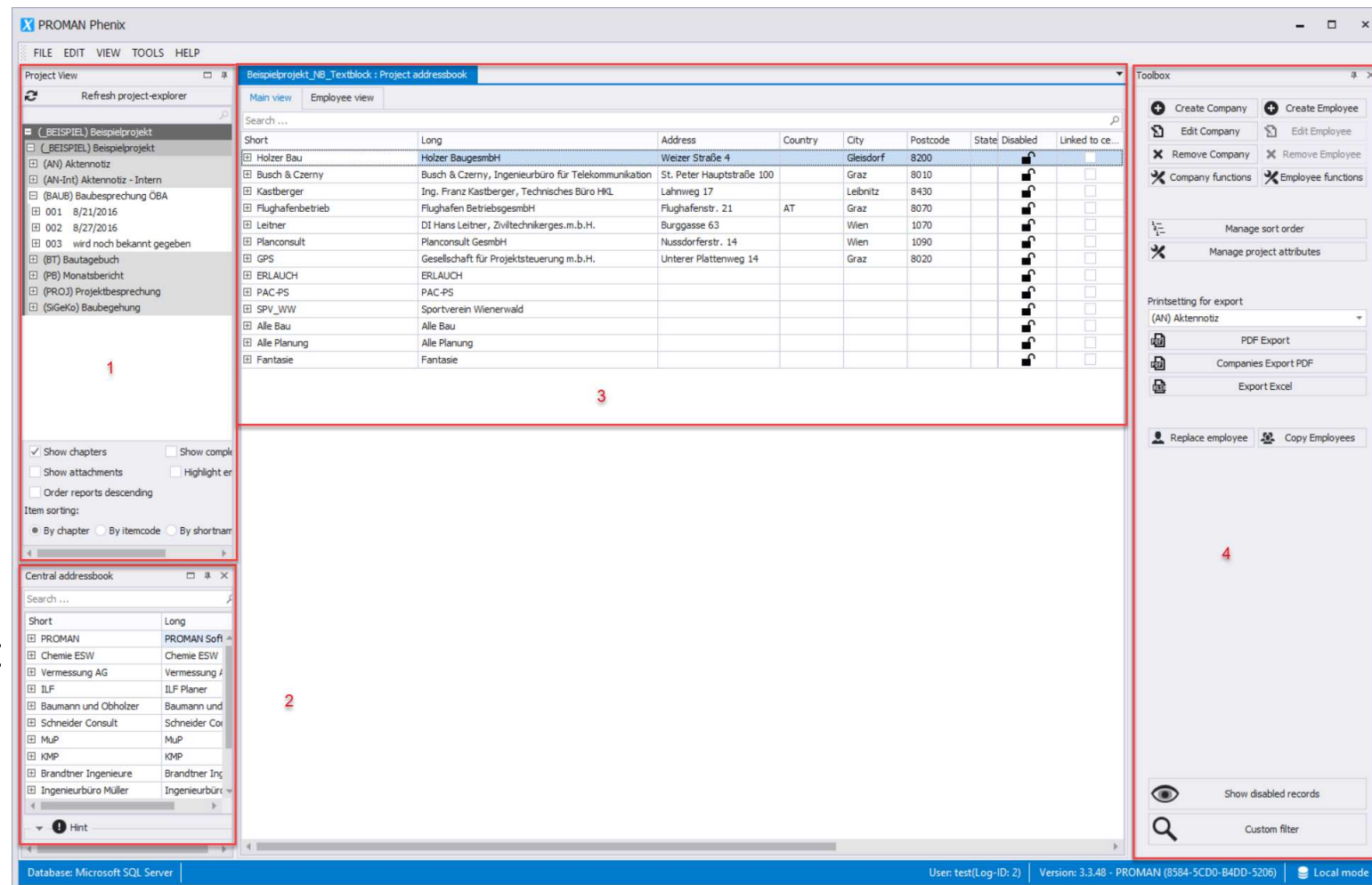
1.1 menu control and masks

The mask elements can be repositioned using drag & drop.
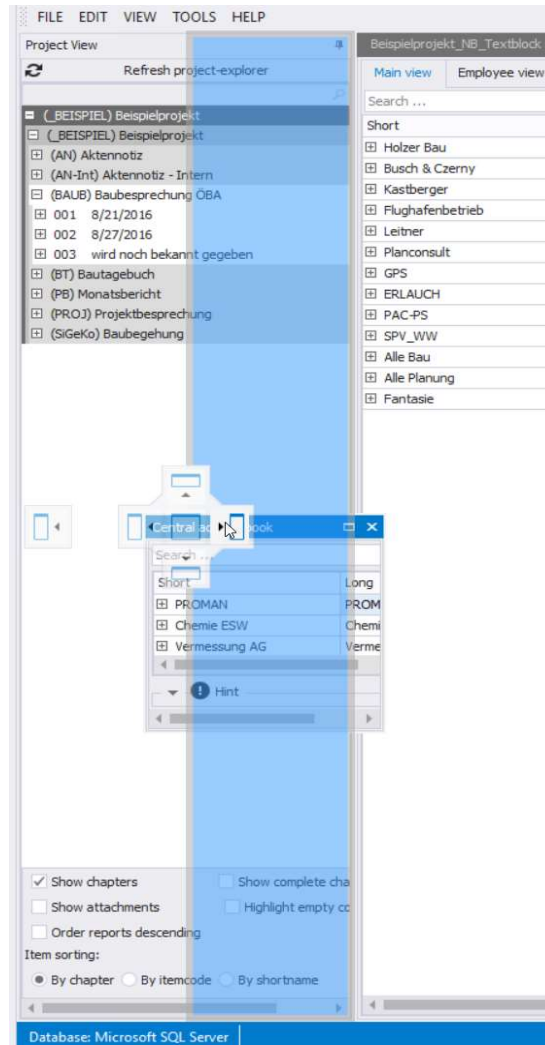
If you can't find a window anymore, you can simply reset the arrangement to the original state.
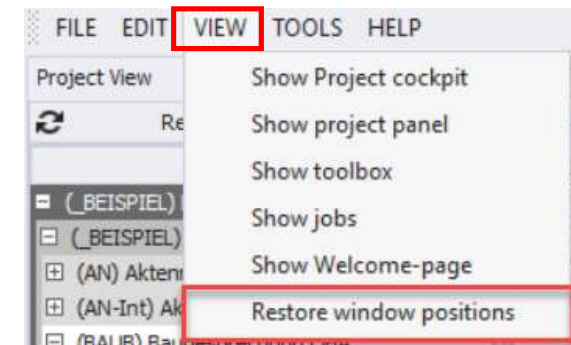
2. Create a new project

Use the menu to create a new project (1)
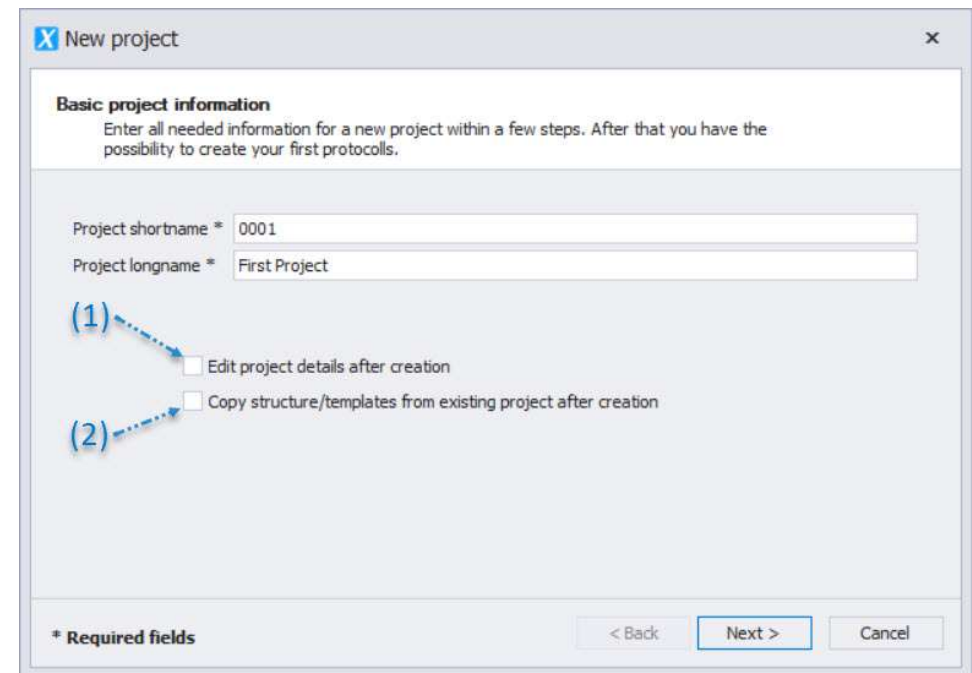
- *Project short name*: This represents a unique key for this project (e.g. accounting number) (*2*)

- *Project long name*: Full name of the project (3)

- *All other fields are optional.*
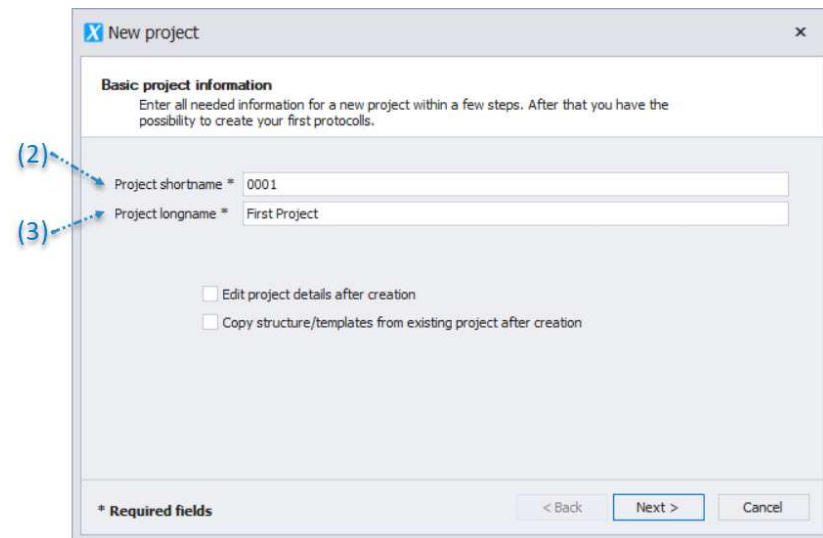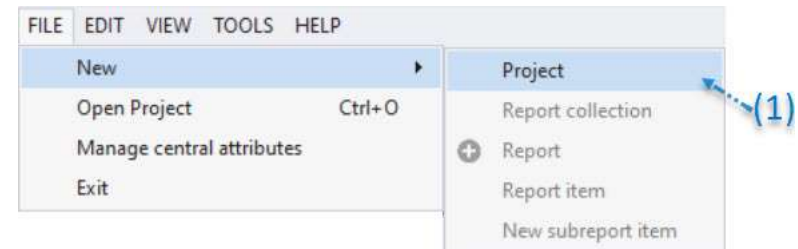
2. Create project

When creating a project you can make the following selections:

- Edit Project Details: In this mask you can enter and edit all details such as logo, description, project code *(1)*

- Copy Structure from existing project: This takes you directly to the "Project Template" screen to transfer data (logo, report collections, chapters, texts, etc.) from existing projects *(2)*

2.1 project general data in printout
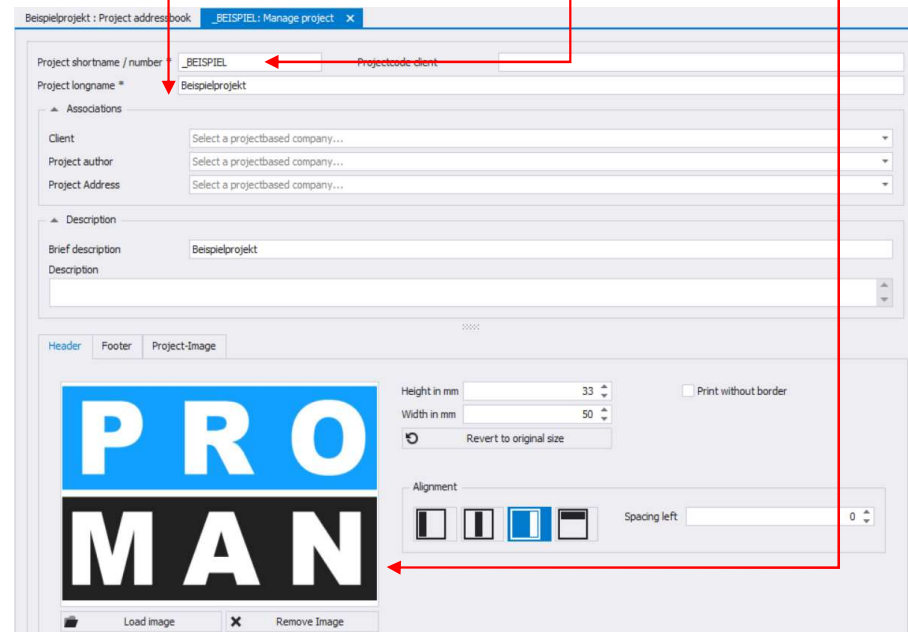
2.2 project logo

- Within the project you can immediately design your header and footer bar.
  - First choose *your logo* (see 1)
  - define the width and height of your logo in the printout *(see 2)*
  - under *alignment* you define the placement of your logo *(see 3)*
  - A text field can be added in
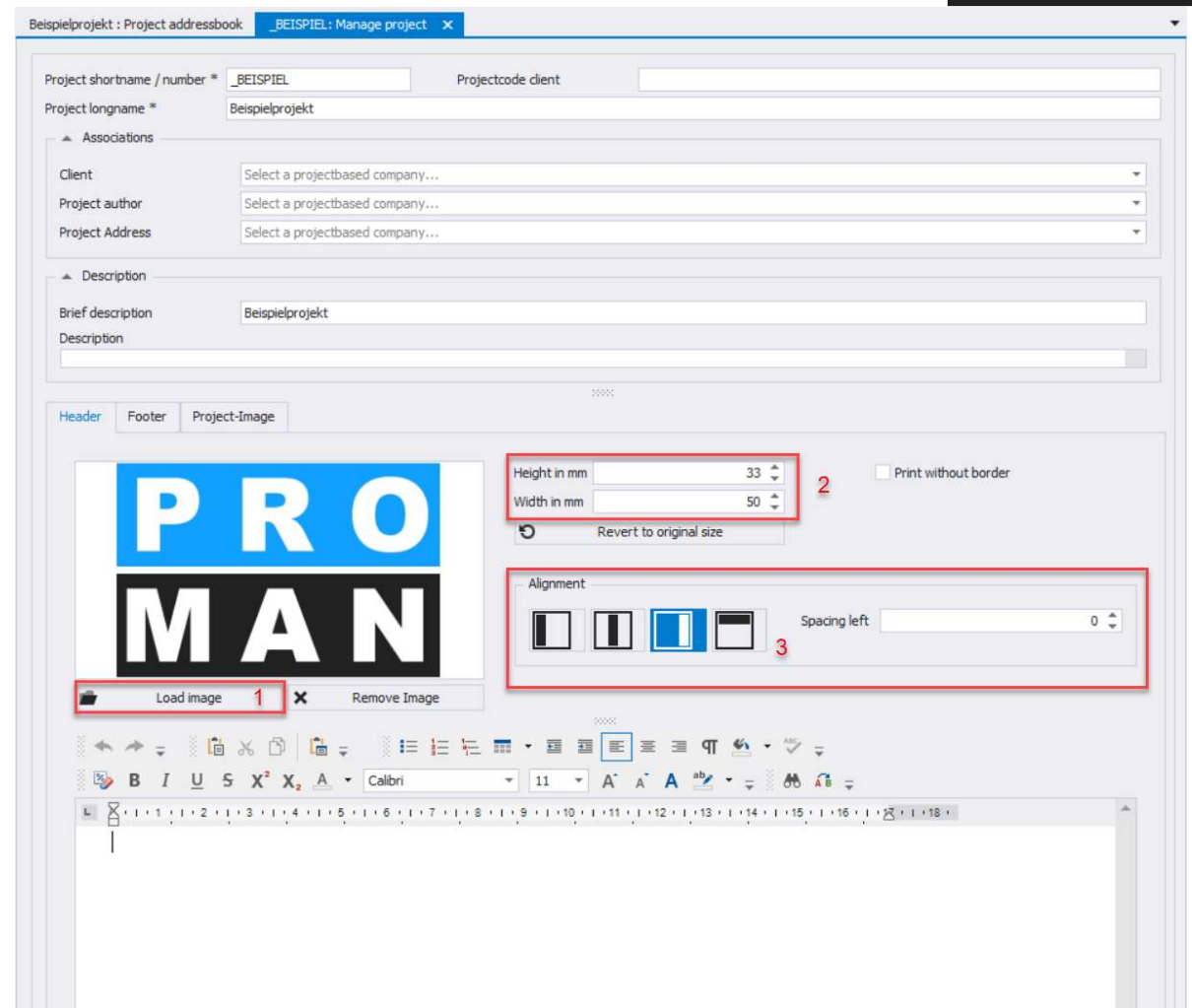
2.3 Project template
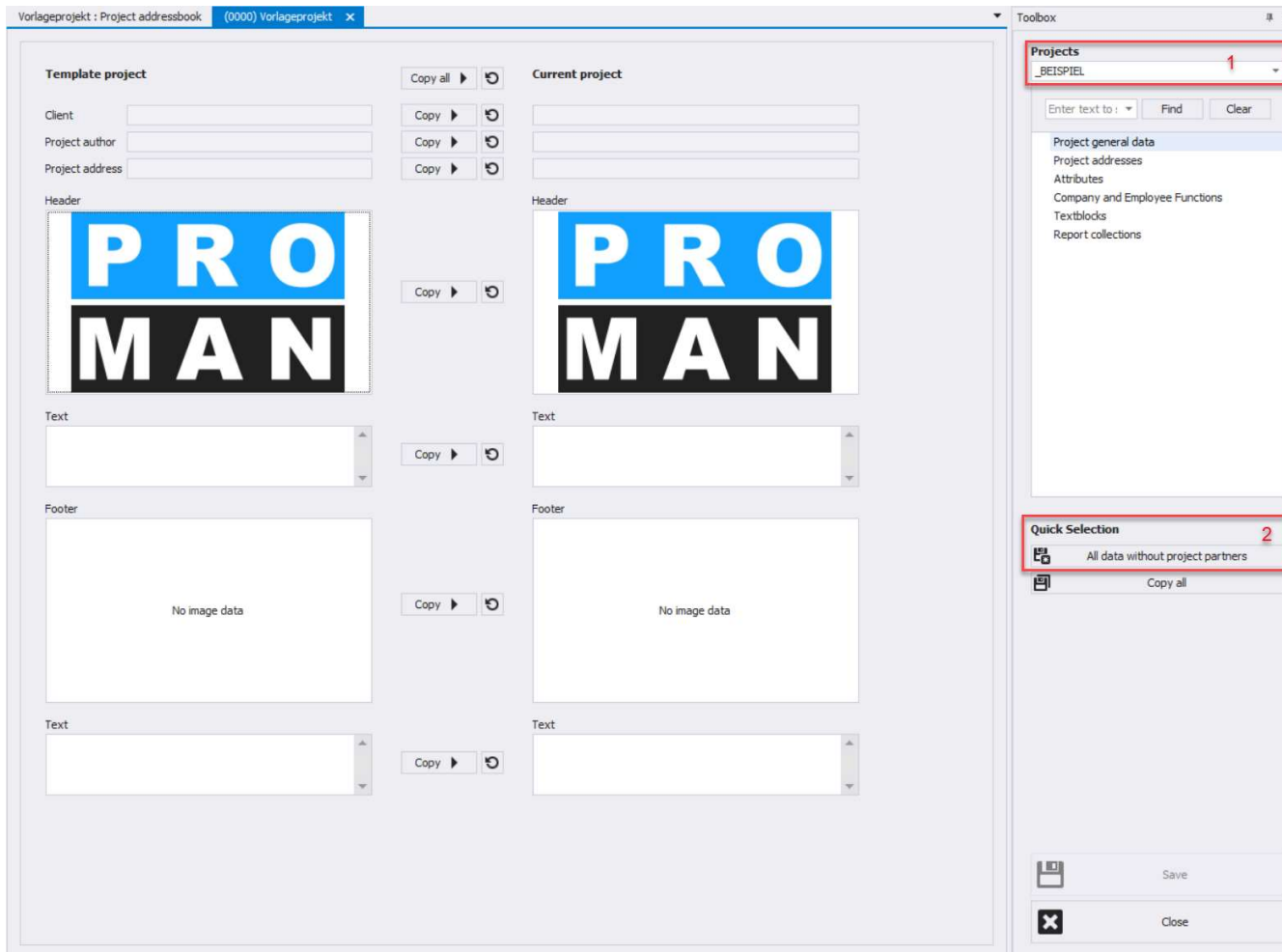
- Enables you to quickly and easily transfer all essential settings and structures from a "template project" *(1):*
  - Header and footer bar
  - General project data
  - Project partner
  - Report collections
    - with chapter
    - with distributor
  - Text blocks
  - Attributes
- With the button "all data without project partner" (2) you can quickly transfer all structural data without project participants.

3. addresses in printout

Participants / Distributors:

Name (w/o Title)	Function	Company	present	Distr.
Waldherr	PS	Gesellschaft für Projektsteuerung m.b.H.	●	●
Busch	ET	Busch & Czerny, Ingenieurbüro für Telekommunikation	●	●
Keppler	BH	Flughafen BetriebsgesmbH	●	●
Ecker	BK	DI Hans Leitner, Ziviltechnikerges.m.b.H.	●	●
Aichberg	BM	Holzer BaugesmbH	●	●
Frank	BH	Flughafen BetriebsgesmbH	○	●
Müller	PS	Gesellschaft für Projektsteuerung m.b.H.	○	●
Schnatter	PS	Gesellschaft für Projektsteuerung m.b.H.	●	●
Höchtl	BH	Flughafen BetriebsgesmbH	●	●
Kastberger	ET	Ing. Franz Kastberger, Technisches Büro HKL	○	●
Rauscher	BM	Holzer BaugesmbH	○	●
Mattersberger	GP	Planconsult GesmbH	●	●

- Addresses are required for the
  - Participants list (cover page)
  - Involved (per report items)
  - session dates
    - chairman
    - writer

001.002		Genehmigung Umsetzen Masten		open
001 / 8/21/2016		Im Baufeld befinden sich zwei Masten. Die Genehmigung für das Umsetzen der Masten durch die OZB erfolgt frühestens ab 22.9.2016.	All project partners	
003 / 9/3/2016		Die Maststatik ist noch immer ausständig und in weiterer Folge auch die Schalungs- und Bewehrungspläne für die Mastfundamente. Die Baugruben für die Fundamente werden von der Baufirma hergestellt.	Busch	9/23/2019
			Rauscher	10/9/2016

Attributes: Änderungen:

3.1 central address management

Under **Tools -> show central addressbook, you can access** the central address management.
- Enables the cross-project storage of addresses
- Addresses can easily be transferred to the projects

Companies and their employees can be defined centrally. This data is used for:
- Participants and distributors of meetings
- Automatic sending of reports with e-mail
- Assignment of involved persons / responsible persons to points
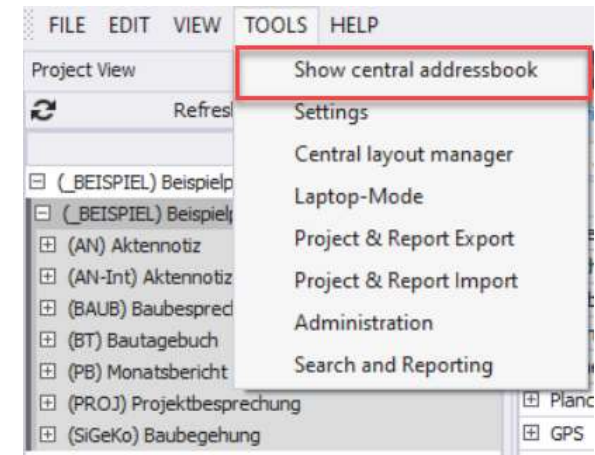
3.1 central address management

In the central address book, you can manage all companies and employees in order to assign them to the desired projects in the next step.

The settings made here apply globally to all projects by setting a standard.

Features of the central administration:

- Classic search: *Search for companies and persons (see 1)*
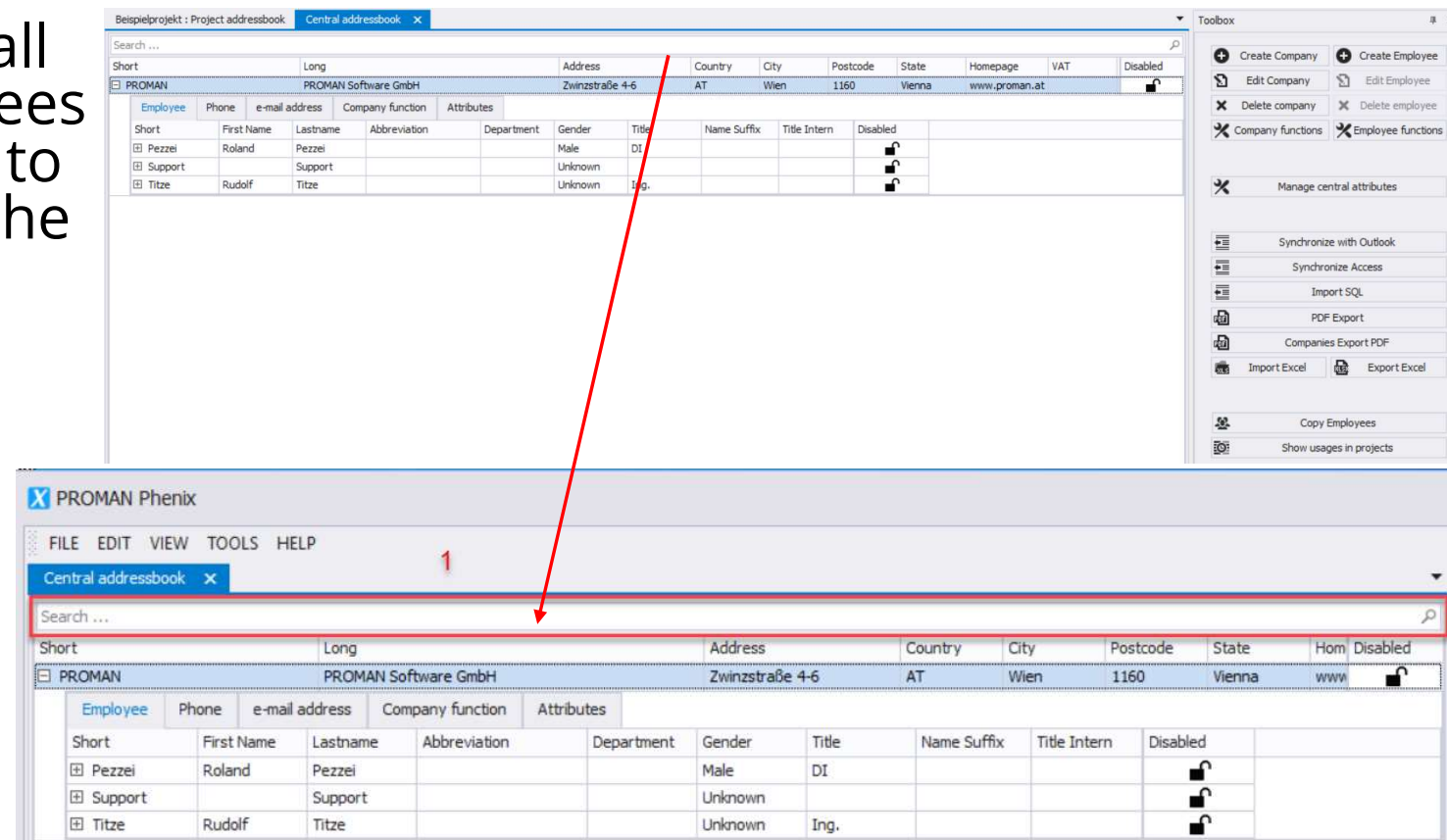
3.1 central address management

Toolbox on top:

- *Create, edit and delete* Companies and employees *(2)*

- *Manage functions* for companies and employees *(3)*

- *Attributes* can be assigned to company employees and report items *(4).*

- *Excel Import / Export & PDF Export / Outlook and Access Synchronization (5)*

- Employees can be *copied* to another company. This does not delete the existing record *(6)*
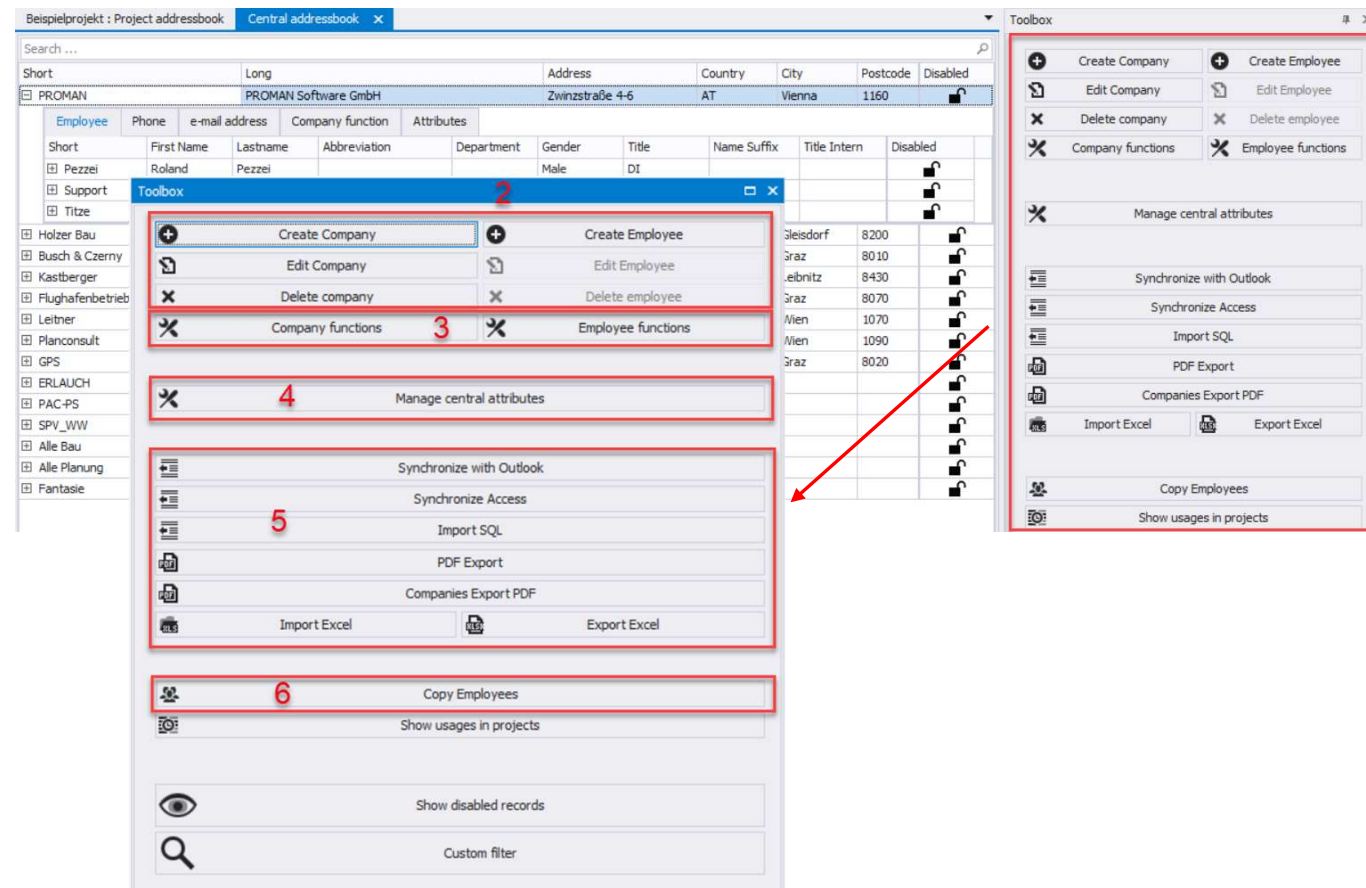
3.1 central address management

Toolbox at the bottom:

- With the button „show disabled records" you can select whether data records that have been archived should be displayed. If the button is blue, the display of archived *data is* activated. *(see 7)*

- In addition to the classic search, the *user-defined filter* allows you to refine your search with a variety of criteria and to display filtered address lists.
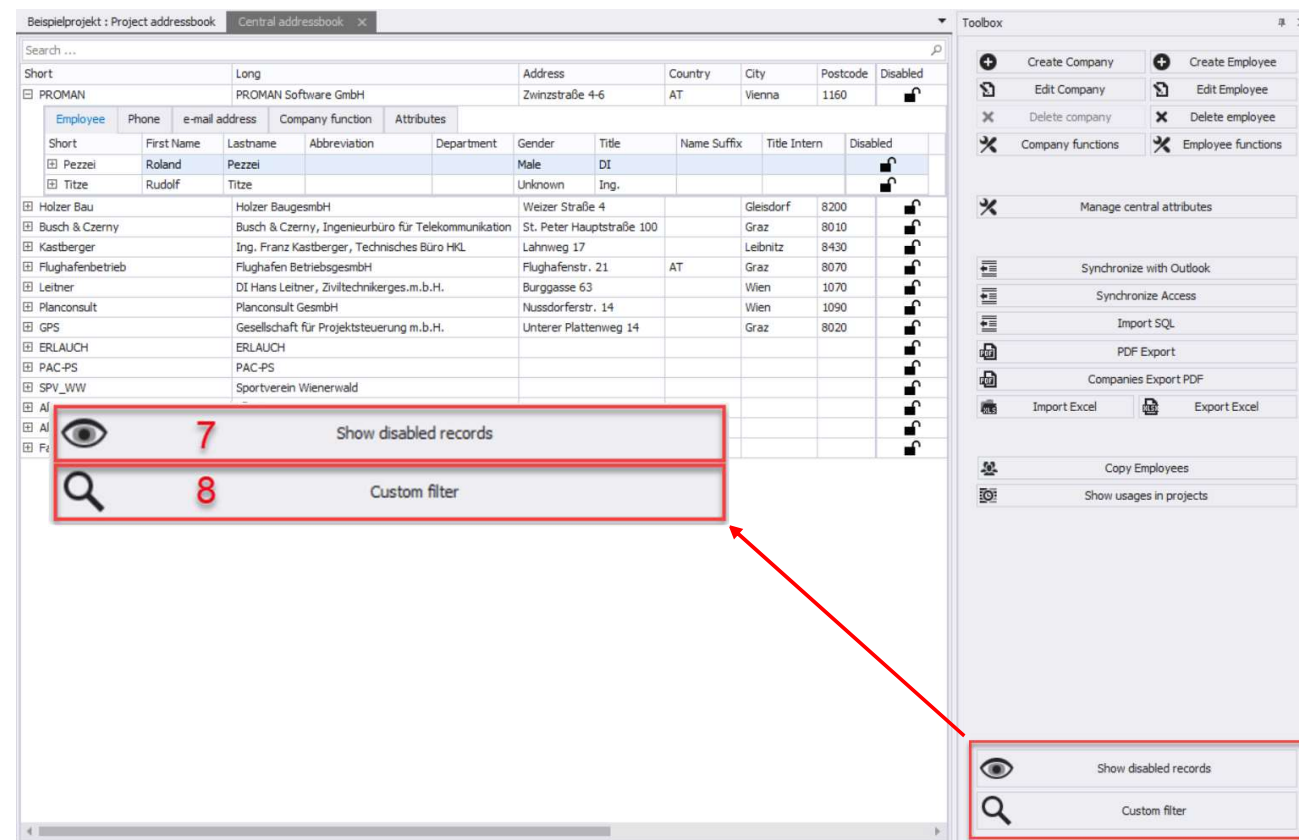
3.2 address management: Company data

Under Address management central -> Create company you can create a new company

- Add the *logo of* the created company as jpg, gif or png *(see 1)*

- *Import option from Outlook* via drag&drop: After creating the company, further employees can be dragged into this field for automated creation (*see 2).*

- *Company short- & long name ->* The short name is unique and can only be assigned once. *(see 3)*

3.2 address management: Company data

Under **Address management central -> Create company** you can create a new company.

- Address information *(see 4)* In the case of "secondary location of", this is indicated on the printout.

- *Departments* with short and long name. The department is assigned via "Add". The department is displayed for selection by the relevant employees. *(see 5)*

- *Attributes* can be assigned via "*Manage attributes*". *(see 6)*

3.2 address management: Company data

- *Telephone numbers & e-mail address of the* company -> suggestions for employees are generated automatically. The telephone number and e-mail address selected as default will be used for the printout. *(see 7)*

- *Functions* with short and long name. The "*Add*" button takes you to the function manager for company functions, where new functions can be created. These are then displayed for selection in the dropdown menu. *(see 8)*

- Now click on *Save (see 9) to* save the entries.

3.3 address management: empyees each firm

You can create a new employee under **Address Management Central -> Create Employee.**

- *Import option from Outlook* via drag&drop (*see 1*)

- *Short* - the short name must be unique and can only be assigned once. *(see 2)*

- *Last name, first name (see 3)*

- *Gender / Title (see 4)*

- *Title* can be used for the long name. *(see 5)* This can be printed e.g. on the cover sheet in the distributor.

3.3 address management: Employees each company

You can create a new employee under **Address Management Central -> Create Employee.**

- *Departments that* were previously created at the associated company can be selected here. *(see 6)*

- *Functions* with short and long name. The "*Add*" button takes you to the function manager for the employee functions, in which new functions can be created. These are then displayed for selection in the dropdown menu. *(see 7)*

- *Attributes By* clicking on "*Manage Attributes*" you can select and add available attributes. *(see 8)*

3.3 Address management: Employees per company

You can create a new employee under **Address Management Central -> Create Employee.**

- *Telephone number & e-mail (see 9) is* used for automatic e-mail dispatch via the local e-mail client (Outlook, Lotus Notes, …). The telephone number entered in the company is prefilled by the employee and can therefore be adapted quickly. From the first and last name, the address administration automatically suggests e-mail addresses in combination with the entered company e-mail address.

- Now click *OK (see 10) to* save.

3.4 Address management: Advantages of naming the company with short form

- short

Allows a space-saving printout of the company name and person

- best practice
  - The short should also enable an external company / person to recognize the participant.
    - Name e.g. Roland Pezzei
      Short name Pezzei
    - Company e.g. PROMAN Software GmbH
      Short name PROMAN

- Long is entered in the field:
  - Long

- person
  - First name
  - Surname
  - title

3.5 Company/employee functions

Functions are often used for the representation of the functions/works of the
Companies and employees.

Create *(see 1)* and edit the functions is easily accessible from the central/project address management.

The functions can also be used to search and evaluate:

- Open tasks, e.g. the electrician, can be searched.

- Functions are created with short and long name. *(see 2)*

- The function can be set per person by means of a *function in the project.*

- Functions can be *disabled and be hidden/shown. (see 3)*
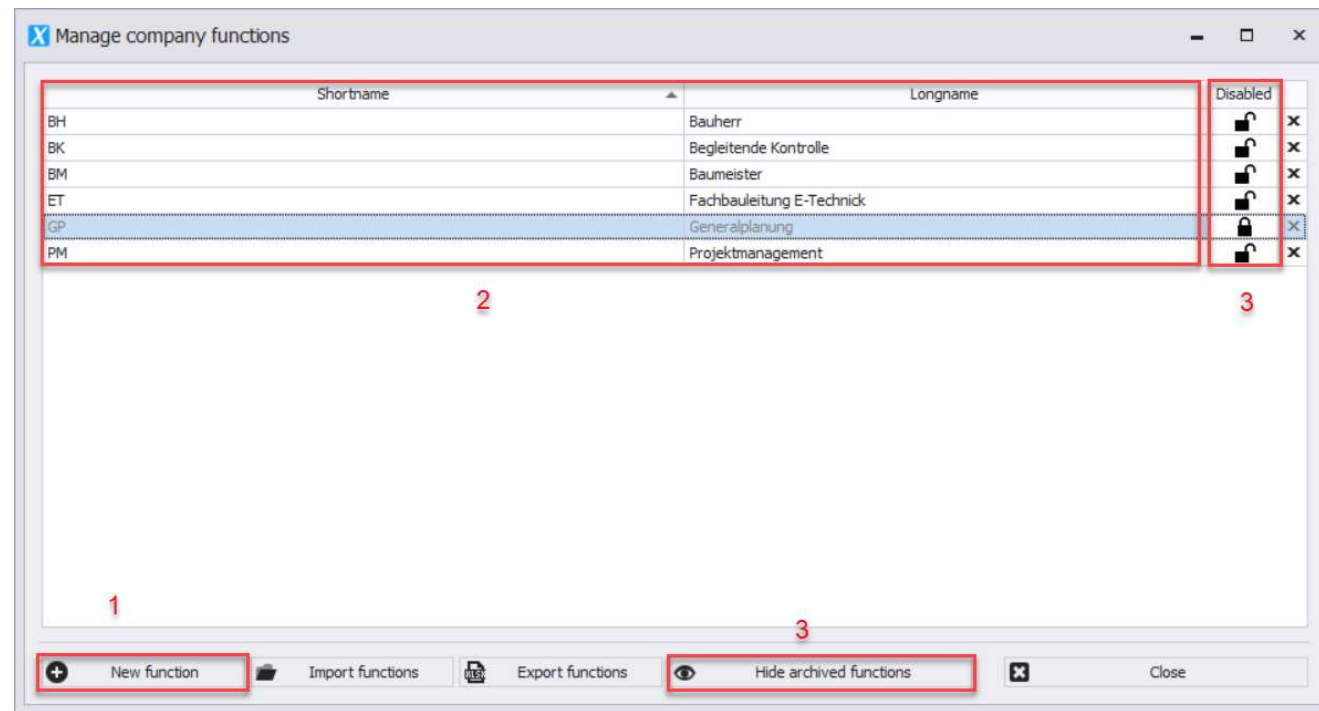
3.5 Company/employee functions

- *Export:* Click on Export to open your Explorer. After selecting the storage location, import and export functions as Excel (see 4*).

- *Import:* select the file to be imported and define the column for short and long form.

- an Excel with the functions is stored.

- This is possible centrally as well as project-related.

- Attributes can be copied from other projects in the project-related address management. *(see 5)*

- If you hide *disabled functions*, they are not displayed during export. *(see 6)*
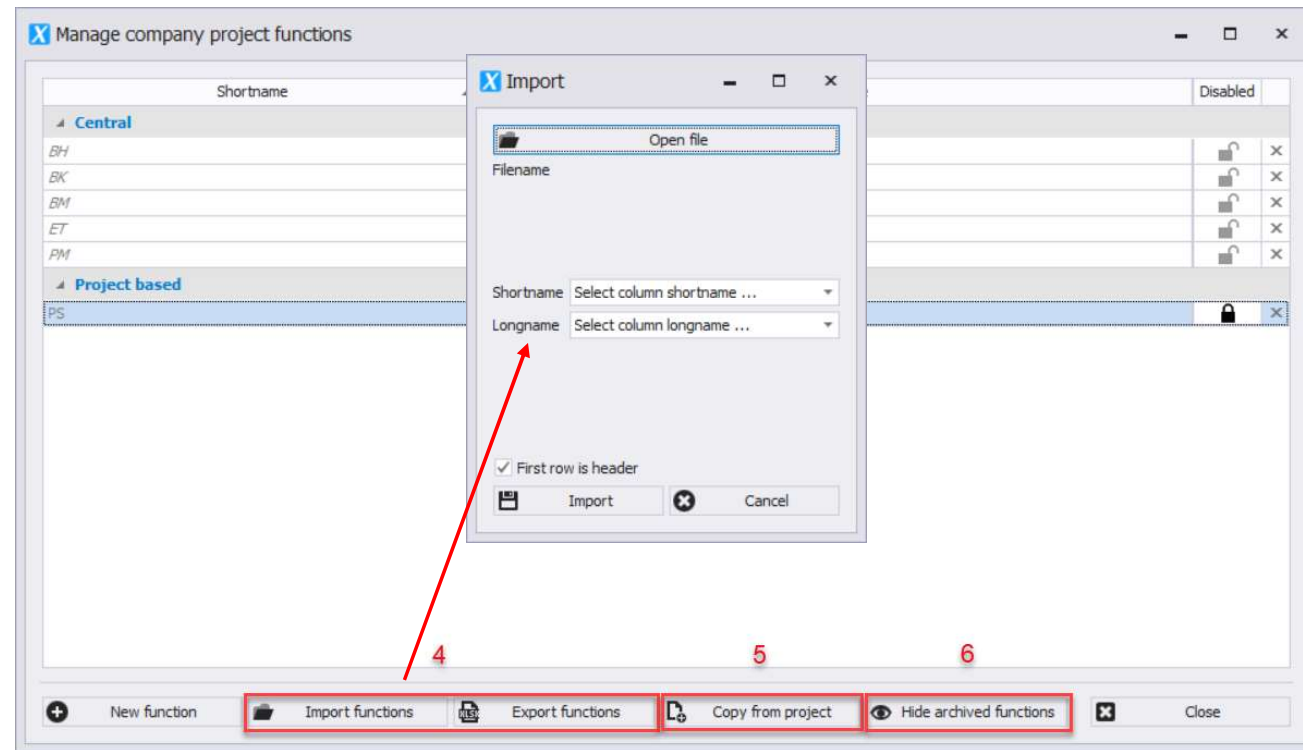
3.6 Company/employee attributes

Attributes can be created project-related and centrally for employees, companies and report items with the toolbox. You can assign them directly in the Create/Edit Company/Employee screens.

- Select "*New attribute*" to go to the mask where you can create your attributes. *(see 1)*

- Specify the desired *short and long name*. *(see 2)*

- You can create different *types of attributes:* List, Editable list, Integer, Yes/No, etc ... *(see 3)*

- You can define whether the attribute can be assigned to companies and/or employees. Accordingly, the attribute appears in the creation and editing screens for companies and employees. *(see 4)*

- Confirm your entries with "*Add*". *(see 5)*

3.6 Company/employee attributes

The values of the attributes of type List, Editable list and List of key/value pairs can be *imported and exported* via Excel. *(see 6)*

- Import: Select the file to be imported and define the column for short and long form.

- Export: Click on Export to open your Explorer. After selecting the storage location, an Excel with the attributes is stored.

- This is possible centrally as well as project-related.

- Attributes can be copied from other projects in the project-related address management. *(see 7)*

- If you hide attributes that have been deactivated, they are not displayed during export. *(see 8)*
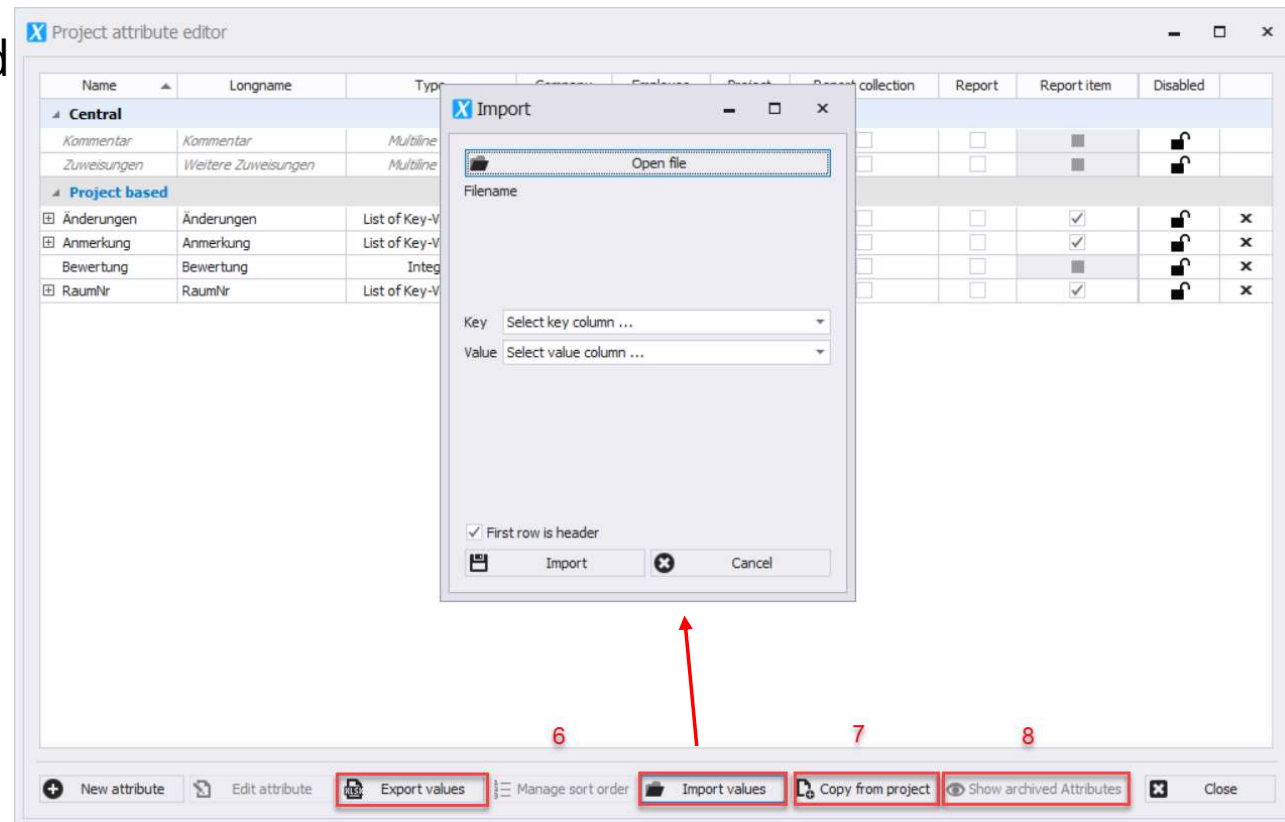
3.7 Copying employees

You can copy employees to another company using drag&drop or the "**Copy employees"** function in the toolbox. The duplicated data record will not be deleted.

- Use the mouse to drag the employee to be copied from the central or project-related address management into the "*Copy data from:"* field. *(see 1)*

- Add the target company using drag&drop in the field "*Copy to:".*
  (see 2)

- Click on *"do copy" (see 3) to* start the query which data should be copied. *(see 4)*

- Confirm your entry with *"OK". (see 5)*

3.8 User defined filter

A user-defined filter is available both centrally and project-related in the toolbox, which enables you to refine your search according to further criteria and to display and export the search result.

- Select your search criteria, e.g. postcode, attribute, department, etc.. *(see 1)*

- Click on *"Start custom search"* to activate the search process. *(see 2)*

- If several search criteria have been selected within a category (e.g. company), you can determine whether all criteria must be fullfilled or one must apply - "Any filter applicable". *(see 3)*
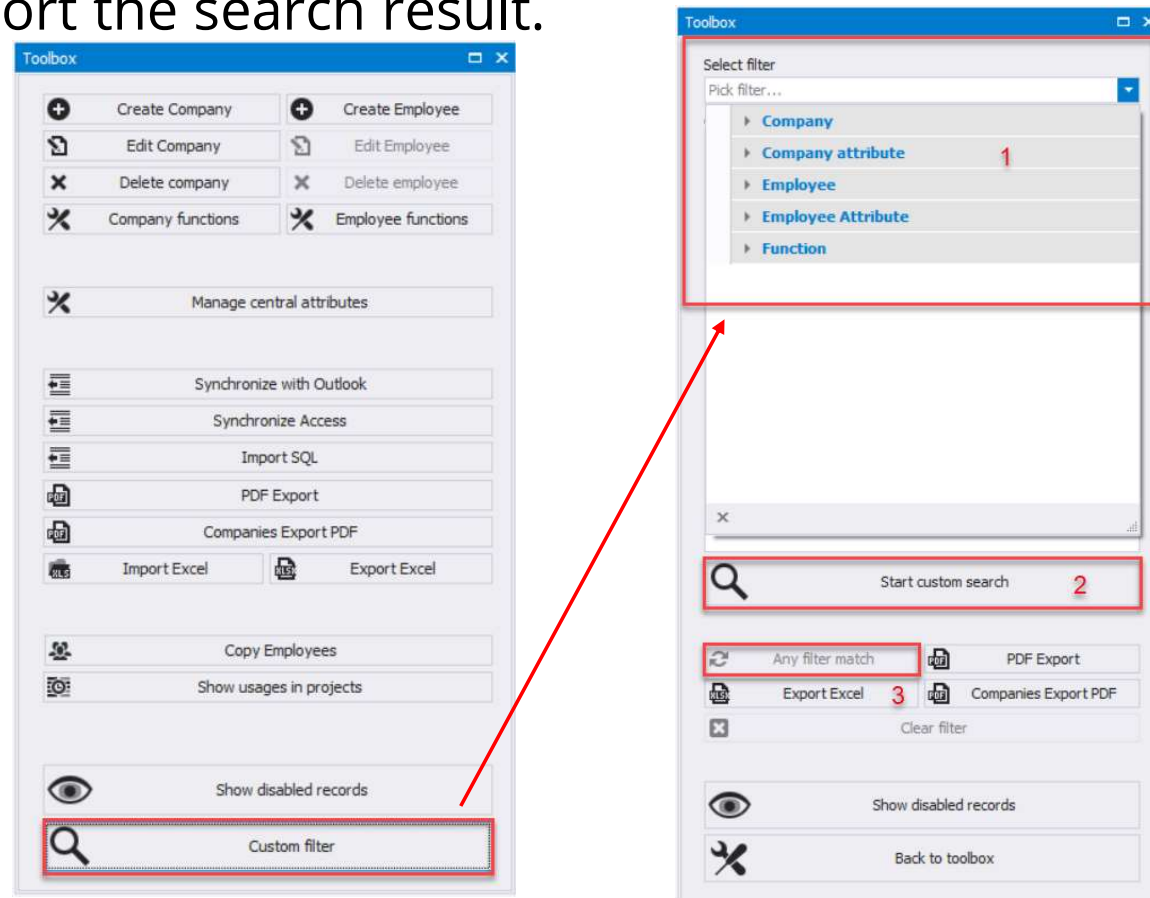
3.8 User defined filter

- To define a new search, you can reset the entire filter.
  (see 4)

- You can *export* your search results as PDF or Excel. *(see 6)*

- In the search result you can also display *disabled records*. These are also filtered, but not exported.
  (see 6)

- To close the custom filter, click *Back to Toolbox*. *(see 3)*
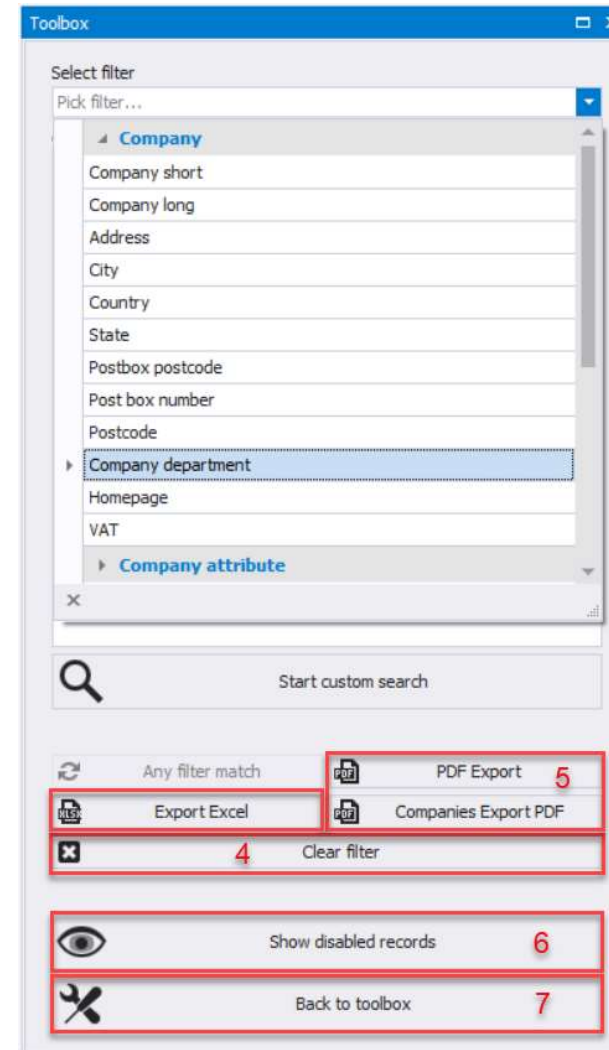
3.9 Excel Export/Import

You can export and import your addresses via Excel both centrally and project-related .

Both functions can be started via the toolbox. (see 1)

- For the *export, select* the desired data (column names) *(see 2)* and click on "Export Excel file". *(see 3)*
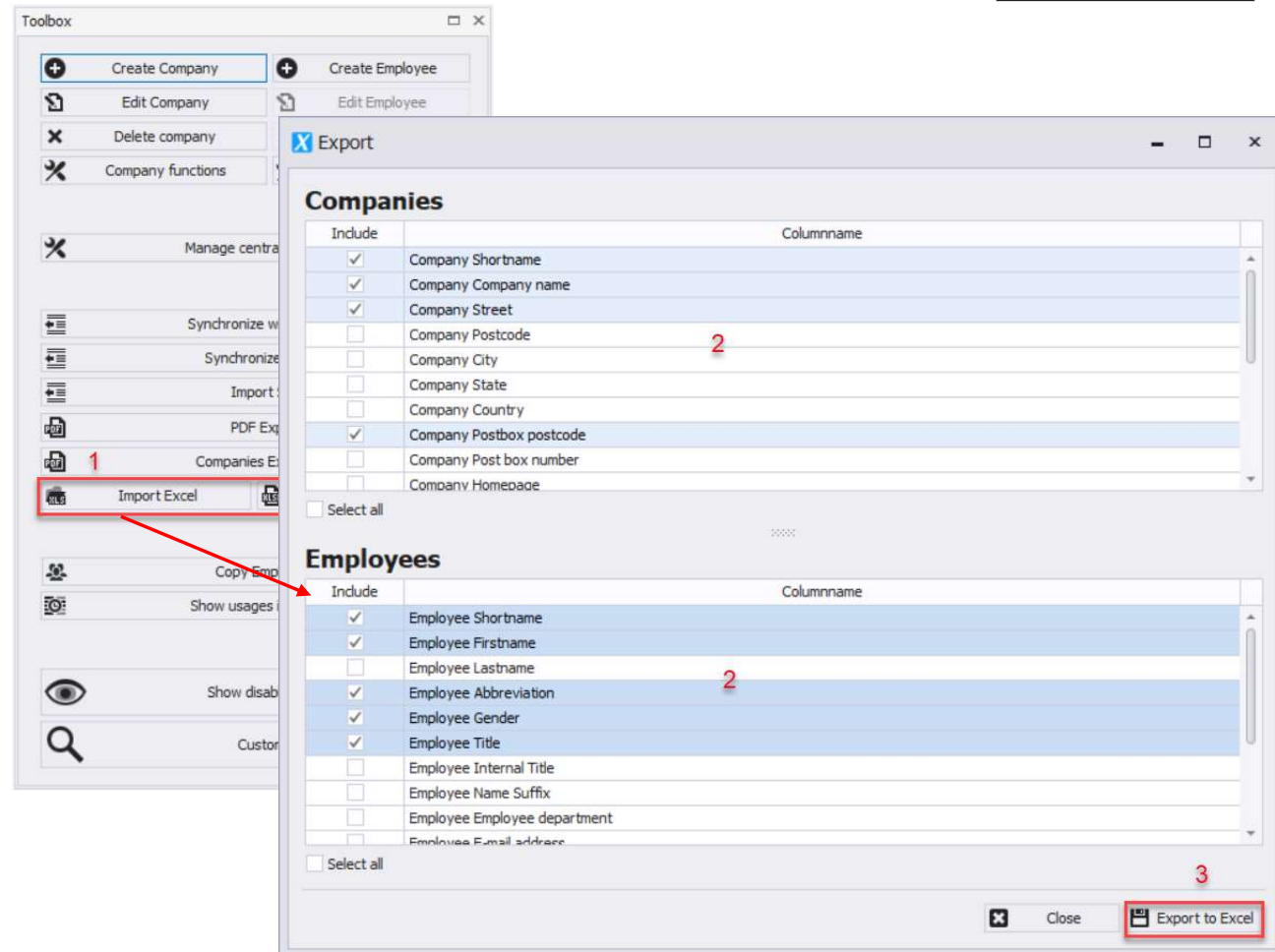
3.9 Excel Export/Import

- For the *import, select* the desired source file using "Open file". *(see 4)*

- The corresponding Excel column name can be selected for each field. *(see 5)*

- For company and employee telephone numbers, e-mail addresses and company functions, required fields can be added and the type selected. *(see 6)*

- Click "Import" to start. *(see 7)*

3.10 Import / sync with other programs

In the central address administration, you can import or sync the following programs.

Under **Tools -> Settings,** you can access the Mask to change the settings.

- Synchronization options:
  - From PROMAN X to Coor
  - From Outlook to PROMAN X
  - From Access to PROMAN X
- Once the settings have been made, the imports or adjustments can be started at any time via the toolbox.
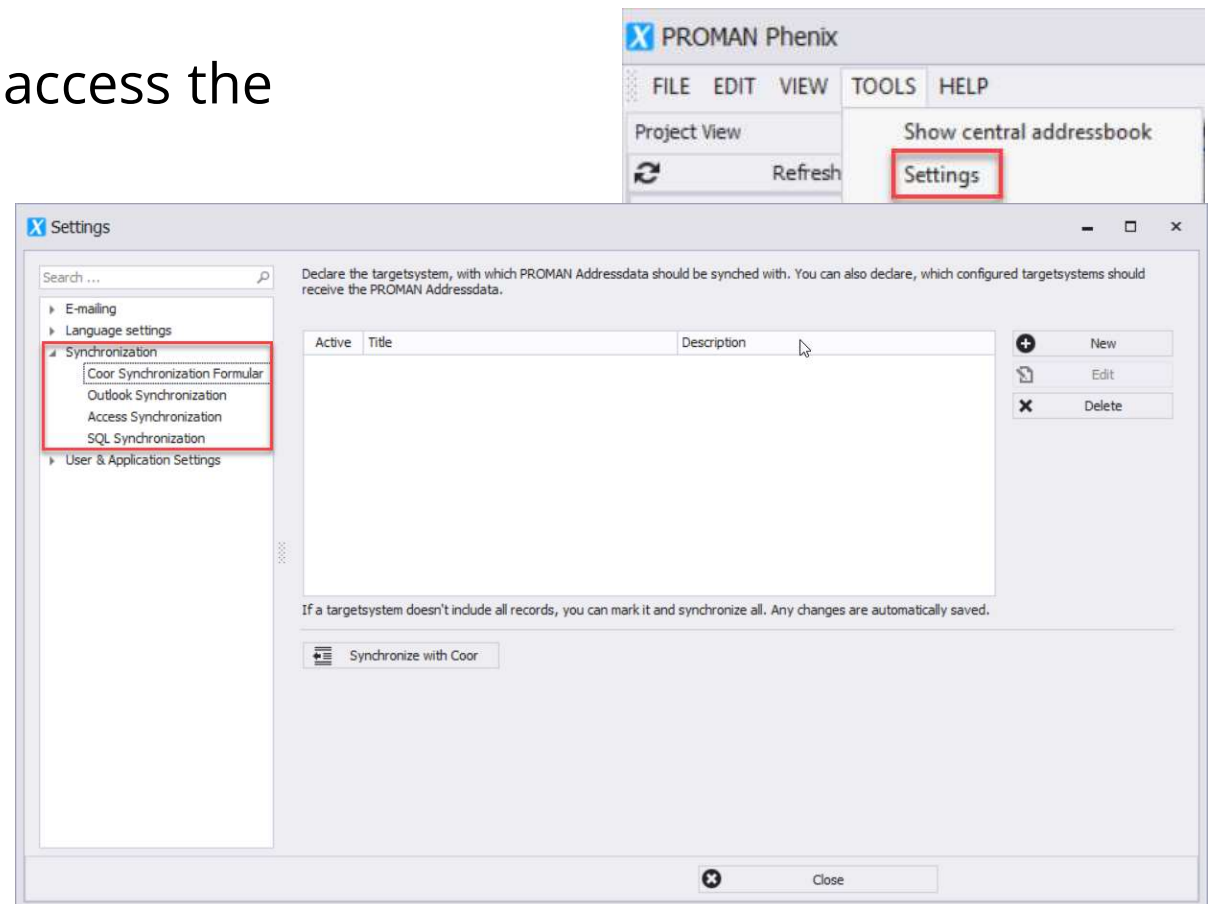
4. address management in the project

Under **Tool -> Central Address Book**

- Company addresses can also only be created in the project.

- As a general rule all companies are created in the central address administration. Only if it is required should you create it in the individual project.

- Addresses can be transferred to the central address management.
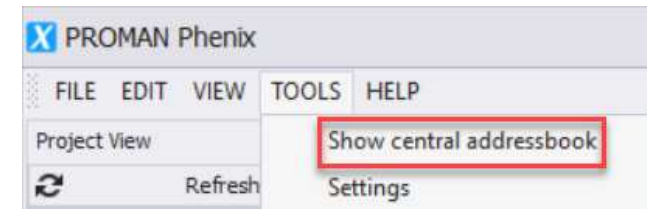
4. address management in the project

The following features are available in the address management in the project:

- View of the central address management incl. search function *(see 1)*

- Project-related addresses incl. classic Search function *(see 2)*
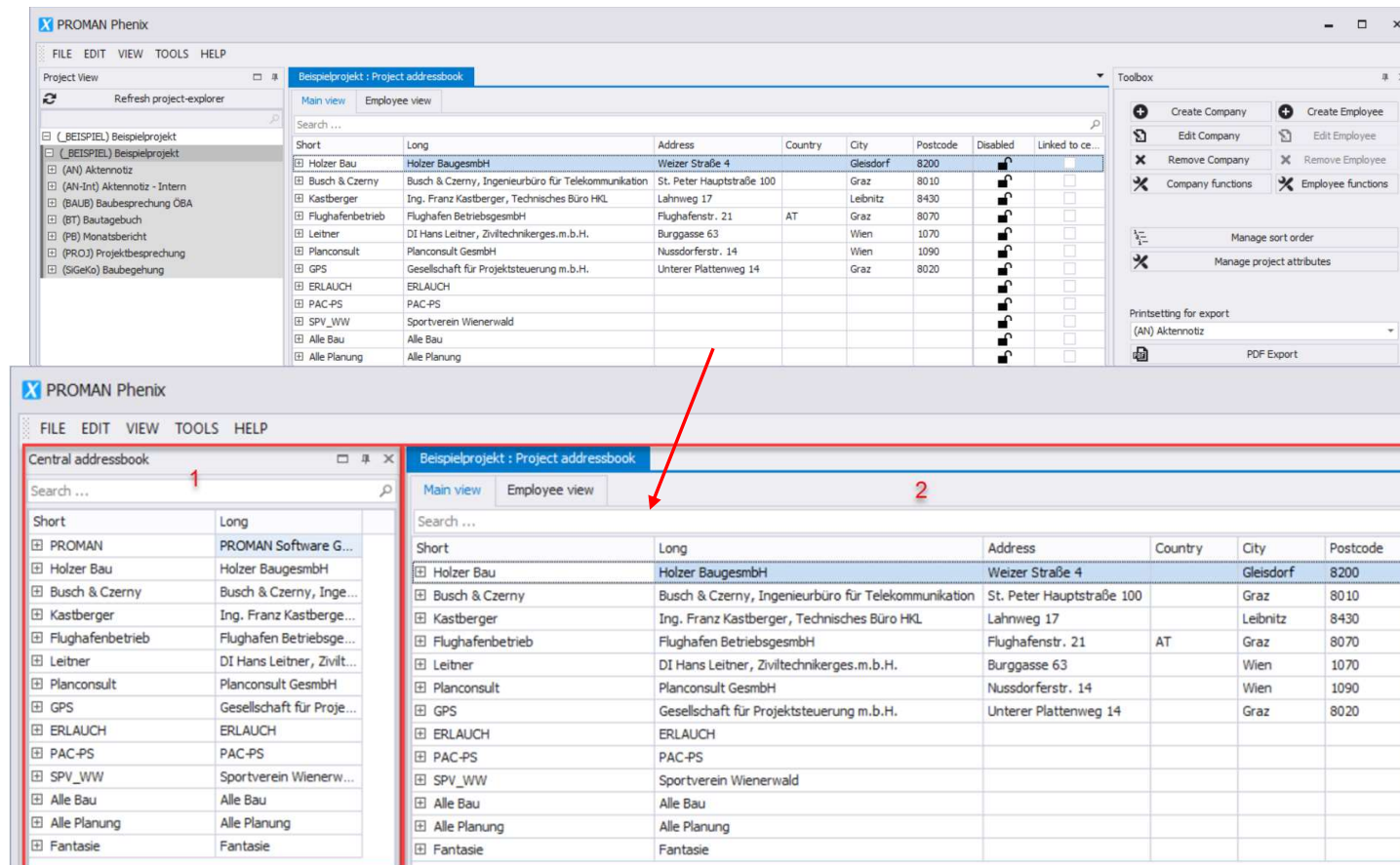
4. address management in the project

- *Create and edit companies and employees (see 3)*

- *Functions* for companies and manage employees *(see 4)*

- The order of the project partners can be defined via „*manage sort order". (see 5)*

- *Attributes can* be assigned to companies, employees, and report items. *(see 6)*

- *Excel Import/Export & PDF Export (see 7)*

- Employees can be *copied* and *replaced on a* project-by-project basis. *In* both cases, the original file is retained. *(see 8)*
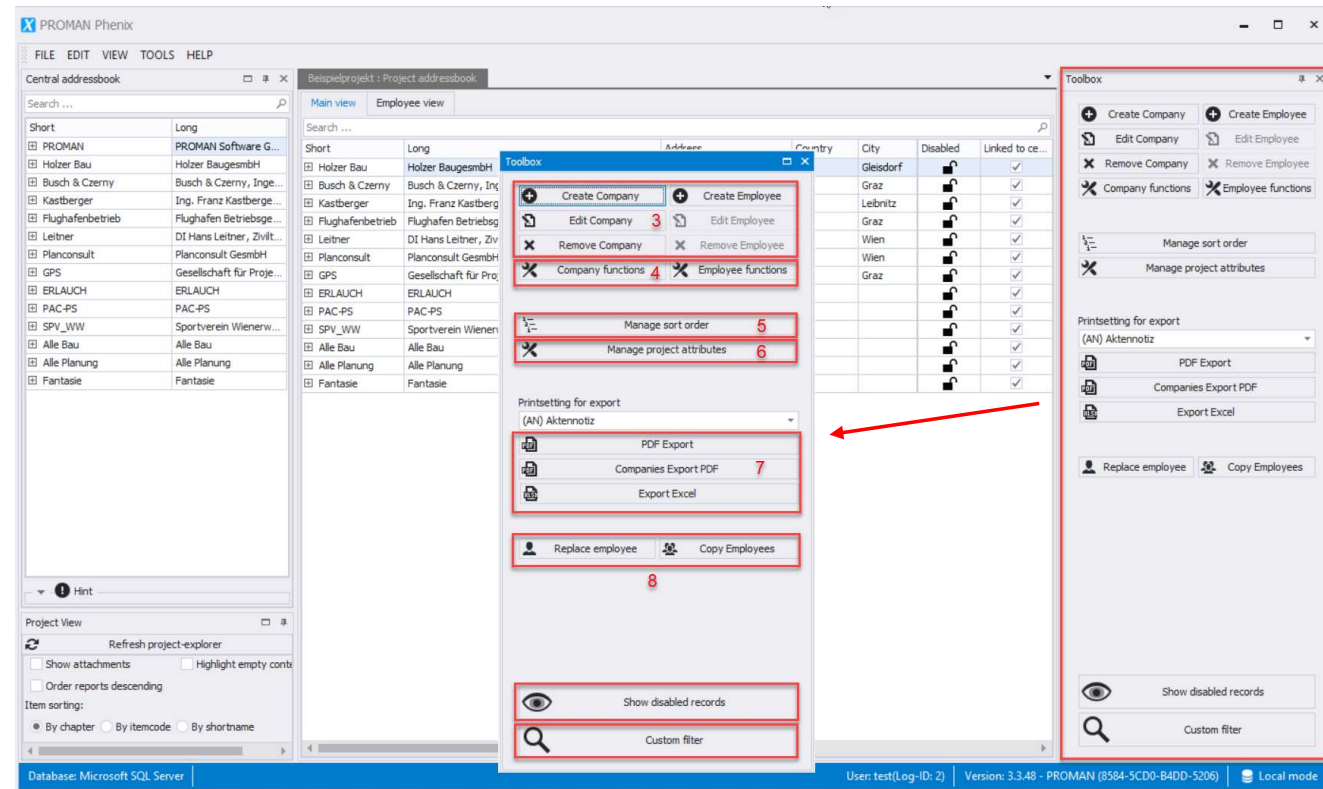
4. address management in the project

- *Companies and employees that have been disabled can be* displayed or hidden for specific projects.
  (see 9)

- The *user-defined filter* also allows you to refine your search and display filtered address lists in addition to the classic search with a variety of criteria. *(see 10)*
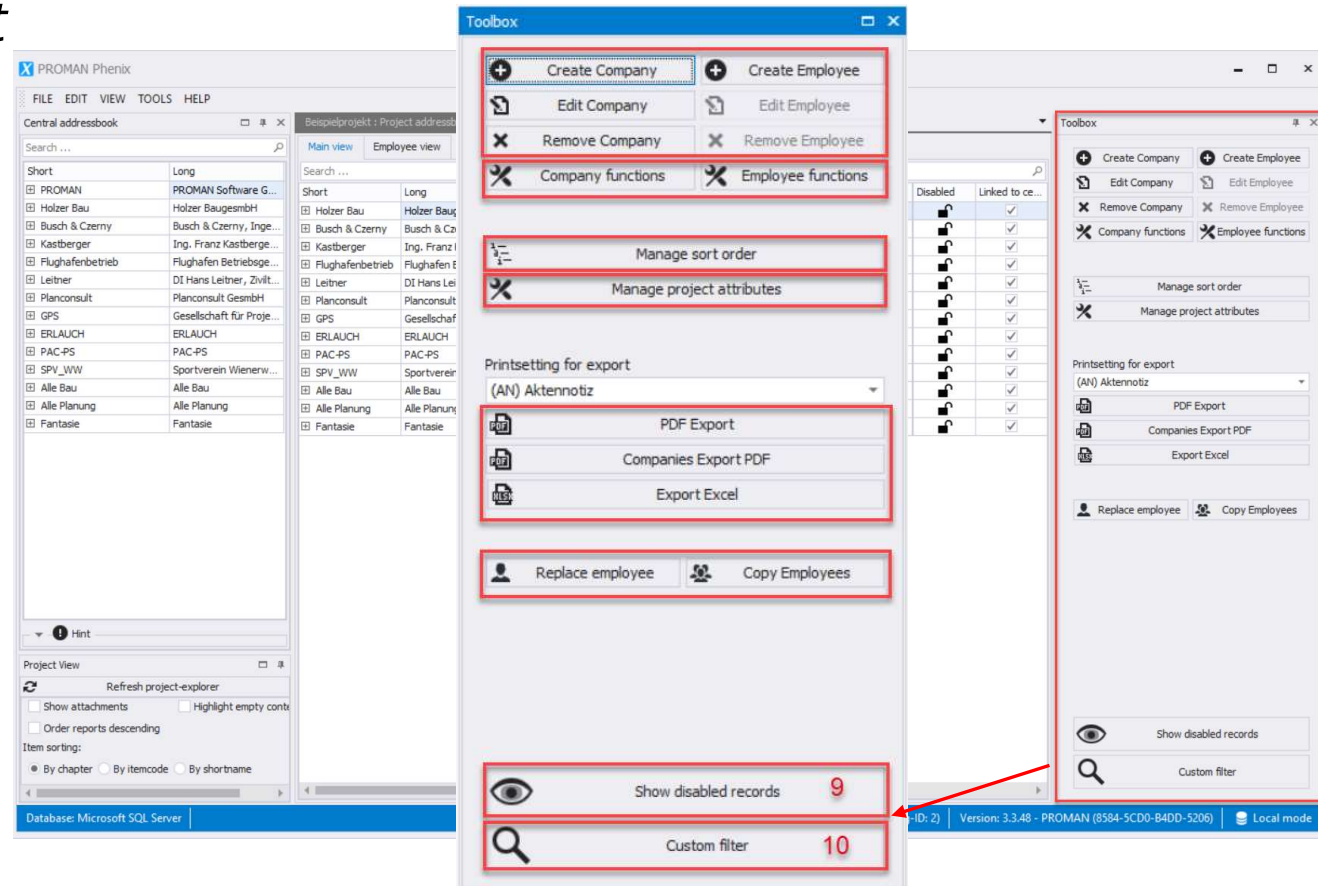
4.1 Importing project partners from the central address management into the project

Transfer of centrally created companies and addresses into your project

- In the opened mask you can select your project partners from the central address management and import them into the project using drag&drop.
  - *Company (see 1)*
  - *Person/Employee (see 2)*

4.1 Importing project partners from the central address management into the project

Company and employee data transferred from the central to the project are greyed out except for the attributes and "secondary site of" and are provided with check boxes *(see 1)* on the side. This status shows you the standard is adopted from the central system. By deactivating the checkboxes, you can change the data any time. The change made applies only to the project.

4.2 Project partners Sorting

In the toolbox of your **project address management** you can define the order of the project partners with the button **manage sort order**

- Is valid for the entire project (e.g. participant lists).

- Moving or clicking on a column redefines sorting.

- You can reset the selected sorting to the standard sorting at any time.

- The sorting number can be edited manually. *(see 3)*

- Employees can also be moved to the desired position using drag&drop.

4.3 Replacing employees

In the report items and distribution lists of a project, an employee can be replaced by another project-related employee.

- Is valid for the entire project (e.g. participant lists).
- Enter the person to be replaced in the "Replace data for:" field *(see 1)*.
- Use the mouse to drag the employee to be displayed in the report items and distribution lists to the "Copy data from:" field. *(see 2)*
- Click on "Replace employee" *(see 3)*.

4.4 Disable inactive datasets

No longer active people can be disabled in the project.

- Employees can be disabled and reactivated. *(see 1)*

- Data records that have been archived can be shown or hidden. *(see 2)*

- It is also possible to disable *functions.*

5 report collection

Is a directory for shared information and contains all reports on a topic.

- meeting groups
- subject areas

You can create a *new report collection by* right-clicking on the project.

- Important points of management of the report collection are:
  - *Collection shortname*: a unique ID of the collection *(see 1)*
  - *Collection longname*: Display in program *(see 2)*
  - *Document path* (optional, but very helpful) *(see 3)*
    - Default setting for PDF output, this path is suggested when saving logs in PDF format.
  - Print settings are accessible in section 4 (more detailed information on slide 13.1).
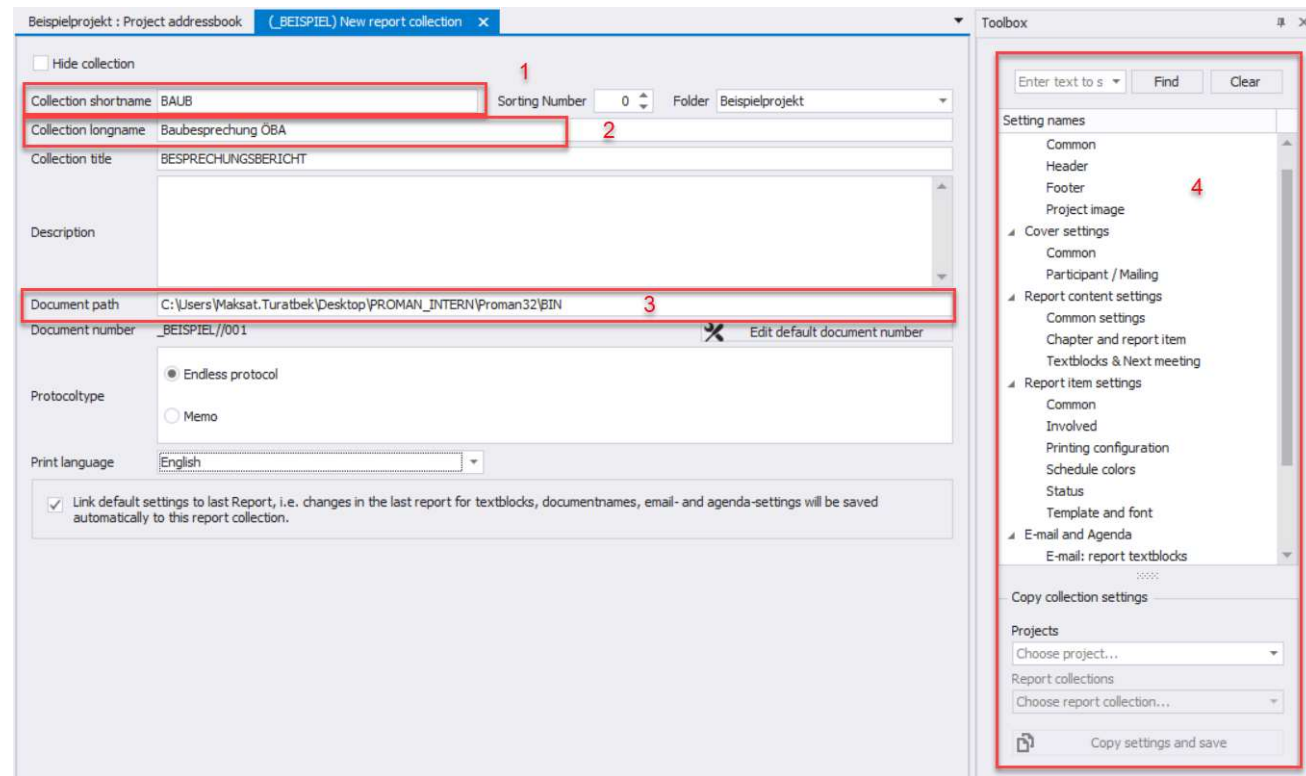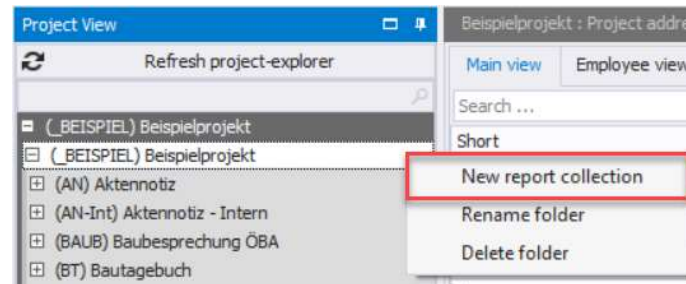
5.1 Report collection Copying Print Settings

All print settings of the report collection

can be easily copied from another report collection.

In the right toolbox of the report collection you can select the collection from which everything should be copied.

With „Copy settings and save" all print settings are copied.

5.1 report Collection print settings

6. Attributes

- are freely definable keywords

- can be assigned to any point

- can optionally be displayed in the printout
  - to highlight important information to the reader
- Specific search
  - Easy and fast search, e.g. all points concerning additional costs

  - Creation of filtered reports, e.g. decision list

Example printout

BAUB 002.005   Bauzeitplan

002 / 8/27/2016   Die Baufirma legt den Bauzeitplan in o
                      Baubesprechung vor. Zuvor wird er ar
                      der ÖBA abgestimmt.

003 / 9/3/2016   Vorabzug des Bauzeitplans wurde vor
                      Version wird in einer Woche verteilt.

6.1 Creating Attributes

Accessible via **File -> Manage central attributes or project-related -> Manage attributes in** toolbox)
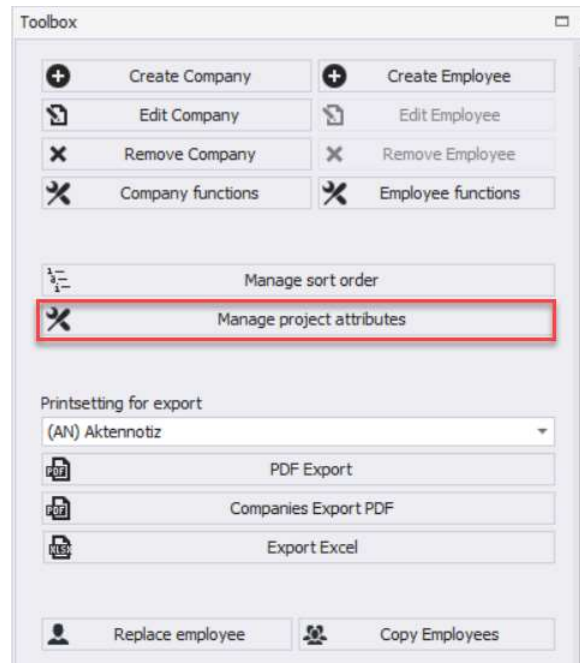
6.1 Creating Attributes

- Click on "New attribute" to open the editing mask *(see 1)*.

- Insert the short and long name *(see 2)*.

- To assign an attribute to a report item, it must be of the type list of key/value pairs *(see 3)*.

- Enter the values of the key/value pair and click on "Add list" to add the value *(see 4)*.

- Allows the attribute to be added to a report item by clicking the checkbox *(see 5)*.

- Attributes can be printed in short and/or long form *(see 6)*

7. chapter structure

With a right mouse click on Report collection you can edit your chapter structure *(see 1)*.

- You can edit created chapters simply by clicking on them, as well as create subchapters with the right mouse button.

- positioning can be controlled by drag&drop or right mouse button

- With *new chapter (see 2)* you create new chapters

- With the right mouse button further functions can be reached e.g. move chapters, create subchapters, change chapter level.

8. Create reports

Right-click on the report collection to go to „new report".

All fields are optional. However, all that are filled appear on the printout.

- Subject, date, time
- In the Header tab: meetingleader and author as well as the meetingplace
- You can also edit the report later by right-clicking on the report - „manage report".
- When you create the report, all open report items are automatically included in the new report.
  No report items are lost, the agenda is automatically created for you.

For further registers see continuation foils.
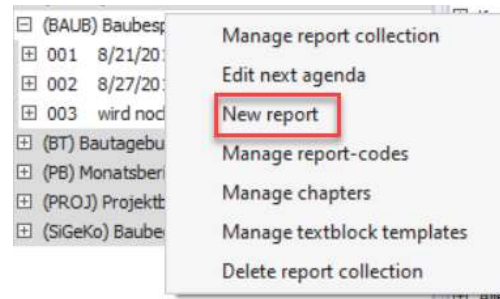
8.1 Report General Data Printout

If the fields are not filled in, the following fields automatically slide together, e.g. if the leader is not filled in, the author moves to the upper line.

8.2 Report: Text blocks

In the textblocks tab, you can insert your textblocks at different points in the report. These are automatically transfered from report to report, but can be changed report-specifically.

- In 1, you've got the list of the textblocks that are active in the report

- *Using drag & drop these can be pulled to the desired position.*

- Editing takes place in the menu „manage textblock templates" (see 2).

8.3 Report: Next meeting

PRO MAN
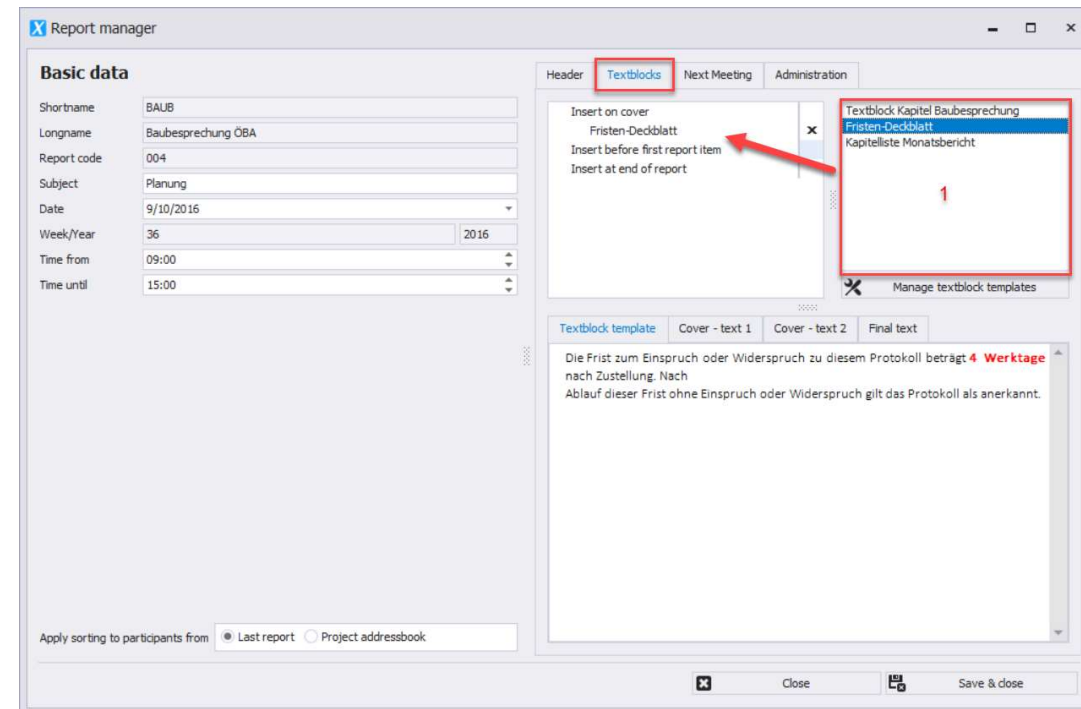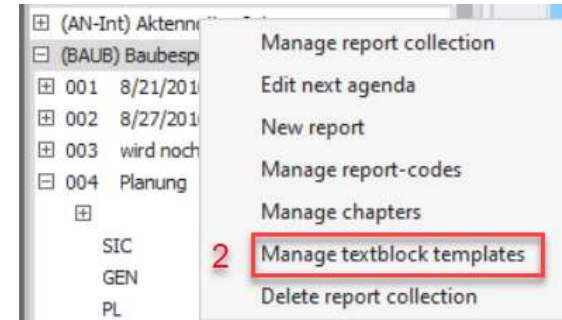
On the *Next Meeting* tab, you can input your next meeting data.

- Mandatory fields: none

- *Optional* - but important fields:
  - *Date (see 1)*
  - *Time (see 2)*
  - *Meetingplace(see 3)*
  - *Positon on report:*
    - *On cover*
    - *End of report*
    - *Don't show*

- You can design your own next meeting template,which you can select in the print template field (see 4)

8.4 8.4 Protocol view

- The protocol view enables the preview of the report and the processing of all essential information.
- This view does not yet correspond 100% to the printout.

8.4 Protocol view: direct editing

- Most fields can be edited directly in the protocol view (e.g. see 1).
- Project participants can simply be dragged into the fields.
- Control information is colored blue (see 2), from left to right
  - The hand to move the person
  - The pen to edit
  - Set as standard distributor (i.e. the person is automatically taken along to the next session)
  - X to remove the person on the list

8.5 Protocol view: Participant and Distribution list

- The distribution list defines the list of participants who have attended the meeting

- The desired project participants can simply be dragged & dropped from the left list to the participant distribution list (1)

- With the "hand" (2) these can be pulled to the desired position

- Columns are defined in the layout and can be changed.

8.5.1 Participants / distributor: extended settings

Click on "Manage participants" in the toolbox *(see 1)* or right-click on the desired report to open the advanced settings of the participants /

distribution lists.
(see 2).

8.5.2 Participants / distributor: extended settings

The administration of the participants consists of three areas:

- Project address book *(see 1):* Simply drag and drop participants into your distribution list (see 2) and define their attendance.
- use the toolbox to edit the desired sort order and add involved persons *(see 3).*

8.5.3 Participants / distributor: extended settings

- The project address book contains the following functions:
  - The employee view shows you all project partners. In the main view, the project partners are grouped by company.
  - Filter by all project partners or a specific report collection*(see 1).*
  - A further distinction can be made by filtering by a single report *(see 2), e.g. all participants of the old session.*
  - In the search field you can also directly find the desired company / person.
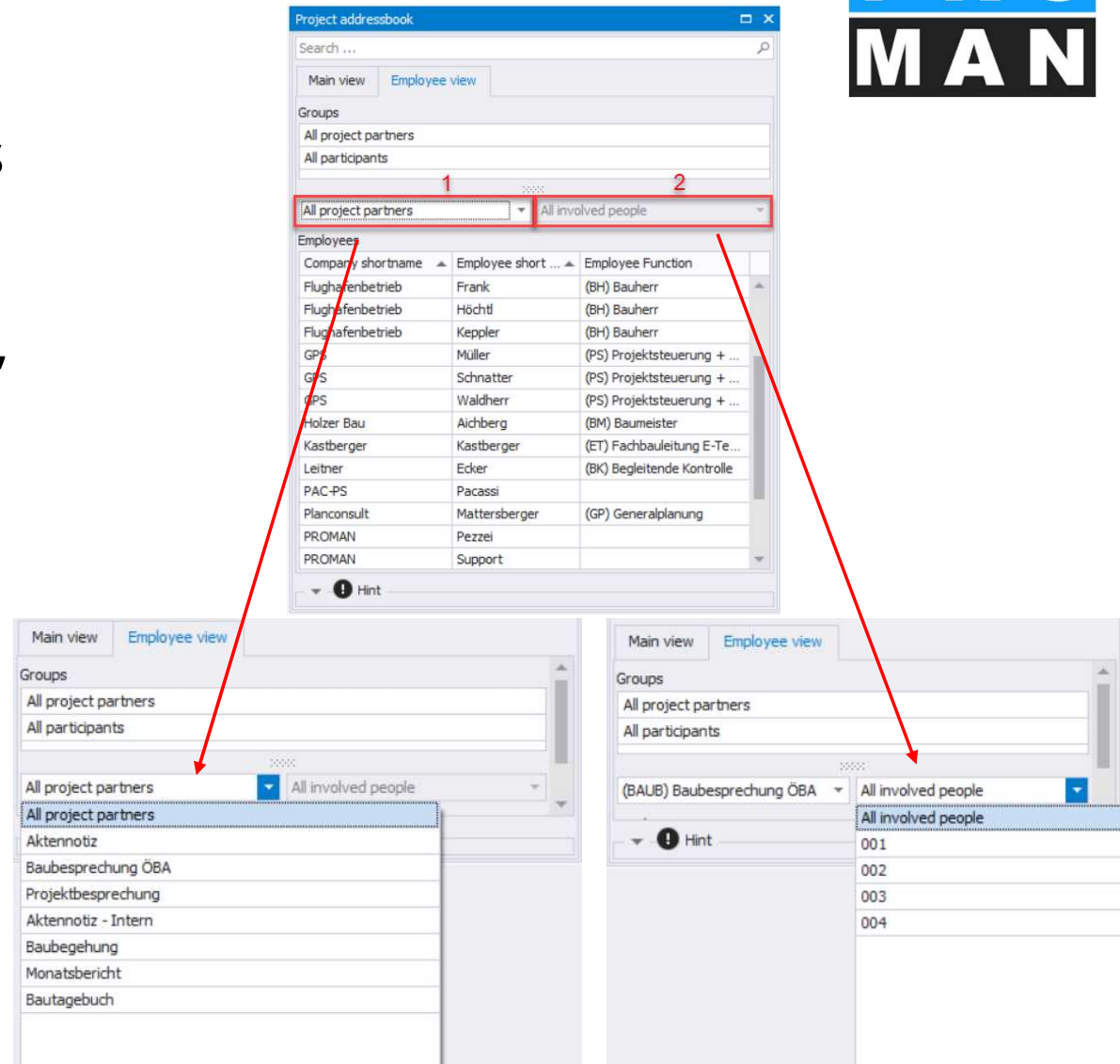
8.5.4 Participants / distributor: extended settings

- Distributor: Defines the distribution group of the document. Also used for automatic e-mail transmission of the report *(see 1).*
- The attendance can be augmented with „partially present" or replaced by "excused" *(see 2).* For these to be printed, a corresponding print template must be set.
- The sorting can be changed by drag & drop.
- *All Employees with a checkmark are automatically entered in the next session (see 3).*

8.5.5 Participants / distributor: extended settings

- The following actions are simplyfied using the toolbox:
  - Involved persons who, are registered as responsible for a report item can be added to the list in their entirety *(see 1).*
  - With one click the status for all participants can be defined *(see 2).*
  - The sorting can be done from the project-related address management or from the last report *(see 3).*

8.6 Protocol View: Create and Edit report item

- Report items can be created with (1) in the desired chapter.

- With (2) subreport items can be created to the desired report item.

- With (3) you can change the chapter of the reportitem.

- With (4) you can paste Pictures or attachments into the report item from the clipboard

8.6 Protocol View: Create and Edit report item

- With a click in the text field, the current information on the report item can be entered / edited.

- Involved can be placed on the right using drag & drop.
  - (1) is an post appointment
  - (2) is the main responsible
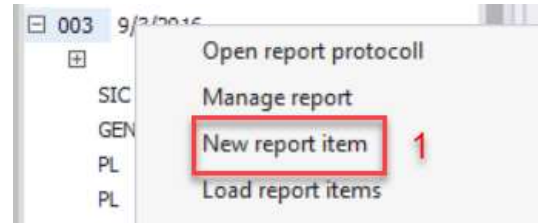 - X for deleting the involved person
  - With or without target date

8.6 Protocol View: Create and Edit report item

- Points can be easily hidden by clicking the printer icon (1)
- individual entries from the history can also be hidden (2)

8.6.1 Report item Create & Edit

A report item corresponds to a task / information in a session.

- With a right mouse click *(see 1)* on the report, you can create a report item in the report.

- Existing report items can be opened and edited with a right mouse click *(see 2)* on the report item or via the protocol view *(see 3).*

8.6.1 Extended report item settings

- **Mandatory fields:**
  - Short name (title) *(see 1)*
  - Status *(see 2)*
- **Optional Fields:**
  - Photos *(see 3)*
  - Attachments *(see 4)*
  - *Involved (see 5)*

8.6.1 Extended report item settings

- Report item Text can be entered in the text field:

  - *Formatting (see 1)*

  - *Spell check inline (see 2)*

- Involved persons can be added to the report item using drag & drop (see 3*).*

- In addition, you can set the following for each already selected involved person (picture below):

  - *Main responsible (see 4)*

  - *Completed to be (see 5)*

  - *Completed is (see 6)*

  - *Post appointment (see 7)*

8.6.1 Extended report item settings

- can be defined in the print settings of the report collection
  - Same as in report item
  - Person / Company / Function
  - Shortname / Longname
    ATTENTION: when printing, there is a limited space, i.e. do not print too much e.g. company & person & function with longname is not possible!

Company	Shortname ▲	Default Function	Main responsible	Completed to be	Completed is	Post app...	Print company	Print employee	Print function	Begin target	Begin actual	Reminder	
Busch & Cze...	Busch	ET	☐	9/23/2019		☐	☐	✓	☐				✕
Holzer Bau	Rauscher	BM	☐	10/9/2016		☐	☐	✓	☐				✕

8.6.1 Advanced report item settings

Here you can define which historical report items are to be printed. This number cannot be greater than the generally defined default.

The number of printed historical report items can be generally defined in the report collection.

8.7 Protocol View: report item Status

- *one-time info*
  - Printed only in the current report
- *Permanent Info*
  - applies to all reports until deletion
  - Text can be changed per report
- *open*
- *in progress*
- *Closed on*
- *canceled*

- *deferred to (or resubmitted)*
  - Reminder function: The item in the current session is printed out once, then hidden until the specified date.

- Your own status: you can easily create your own status in the report management, for example:
  - Decision, CRQ
  - Open in the colours (red, orange, green) …

8.8 Protocol view: Pictures and attachments

- Images can be placed above or below the text using drag & drop.

- With (1) the position of the image can be changed.

- With (2) the image can be further edited (cut, mark,..).

- PDF attachments can be added to the report item using drag&drop.
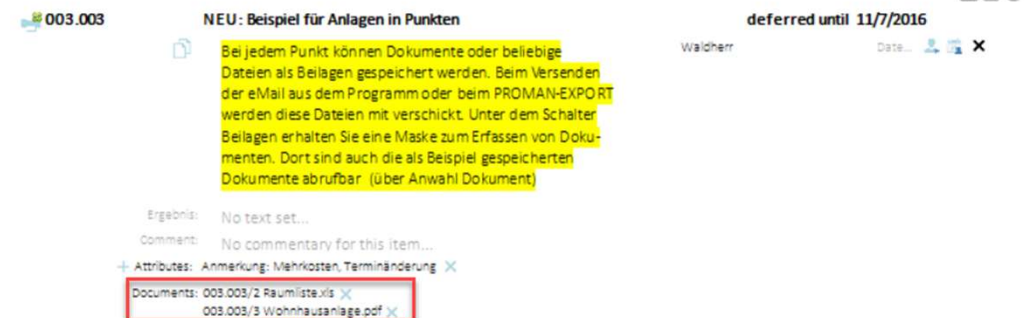
8.8.1 Advanced Settings: pictures

- Images can simply be dragged and dropped into the respective image fields (*see 1).*

- They can be placed both before and after the text.

- Further settings can be made via *"Manage report item images"* in the toolbox *(see 2).*

- The images are automatically stored in the database. The size is reduced in order to achieve an optimal Memory & Quality ratio.

8.8.1 Advanced Settings: pictures

Via "Manage images" you determine
- the width of the photo in the printout *(see 1)*:
  - like text block
  - from text to right pagestop
  - entire page width

- to select the desired storage location or load images from the clipboard *(see 2)*.
- You can insert two images next to each other.
- Title of the image *(see 3)*

8.8.1 Advanced Settings: pictures

- In the tab „Imageeditior" *(see 1)* you can quickly and easily adapt your photos and plans:
  - Cutting *(see 2)*
  - Insert text and shapes *(see 3)*
  - Set markers with drag&drop *(see 4)*
  - Undo all changes *(see 5)*

With this feature, you can directly highlight relevant image sections, plans, positions, defects, before-and-after statistics much more visually.
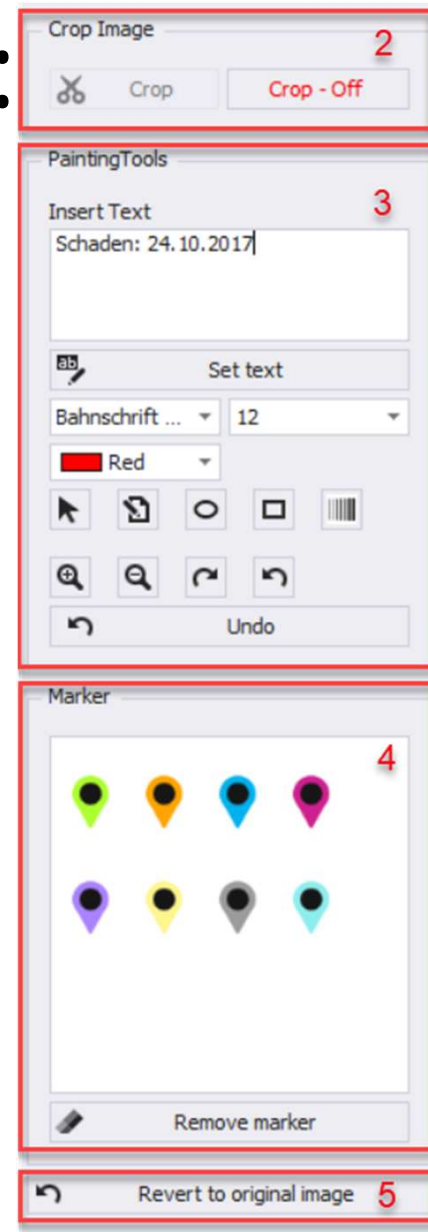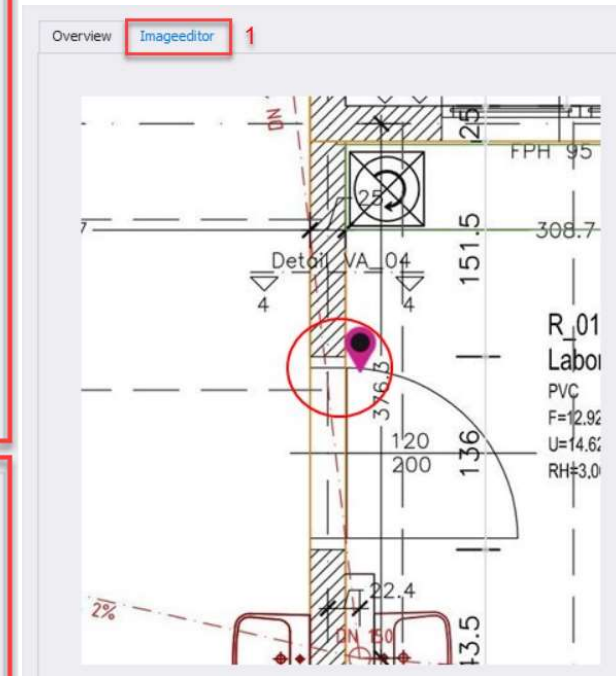
8.8.1 Advanced Settings: pictures
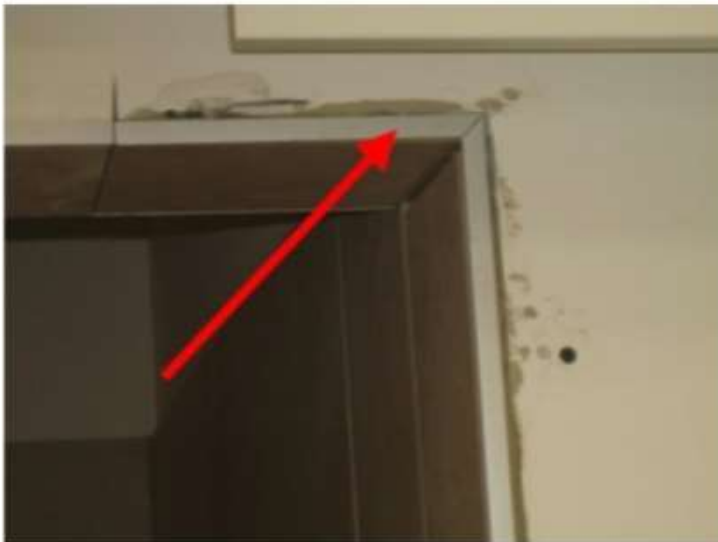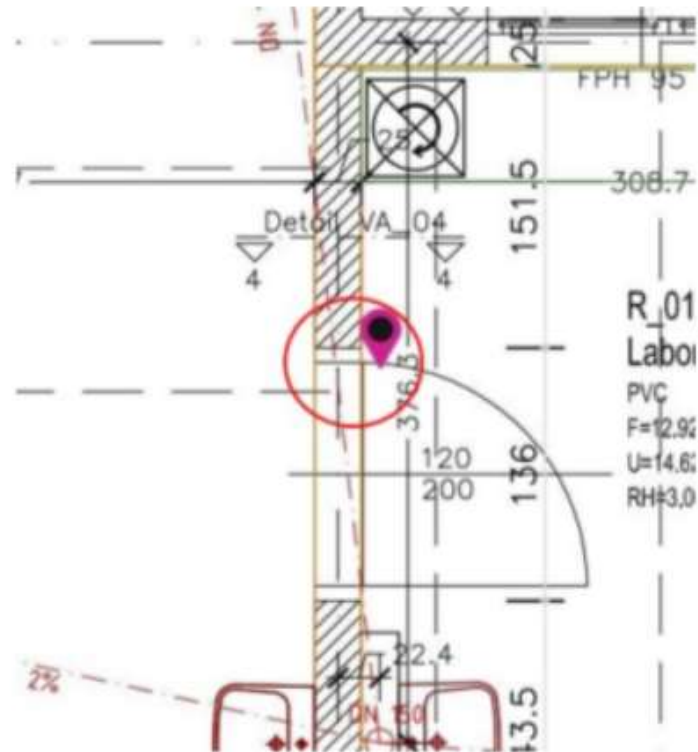
8.8.2 Advanced Settings: attachments

- Attachments can easily be dragged & dropped into the field (*see 1*)

- Or via "Manage report item documents" *(see 2)* further settings can be made
  - By *ticking the* option, the document can *be* saved in the database *(see 3)*.
  - this version of the document is saved unchanged in the report!
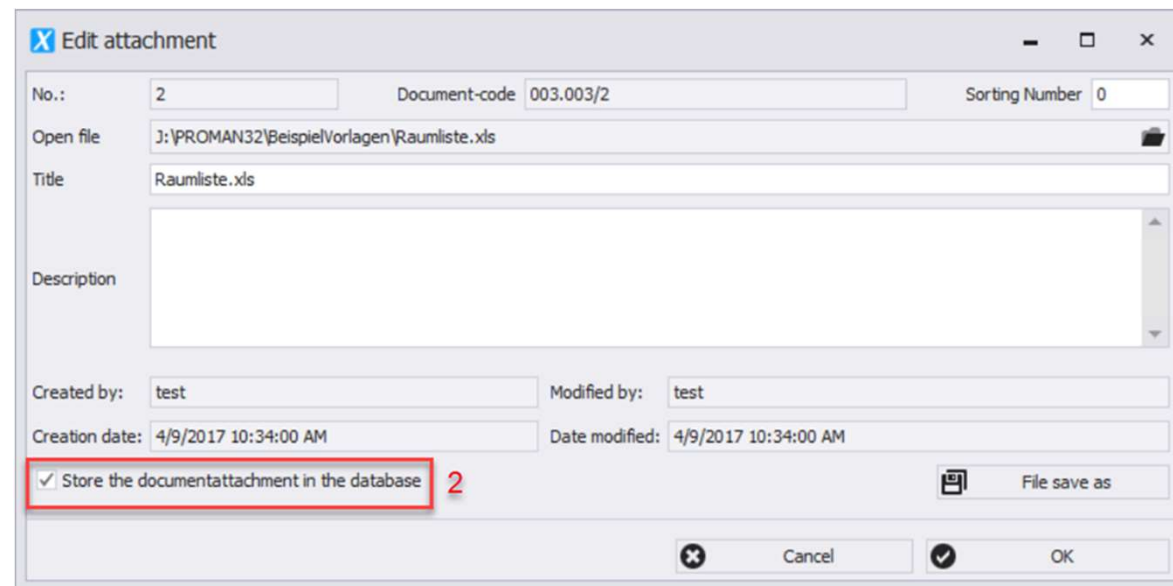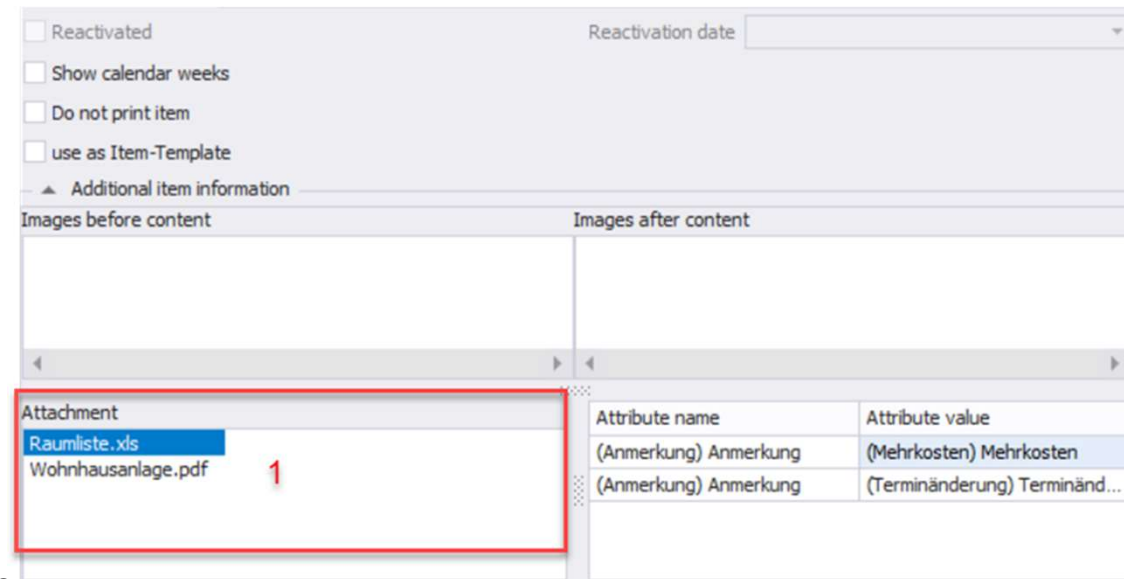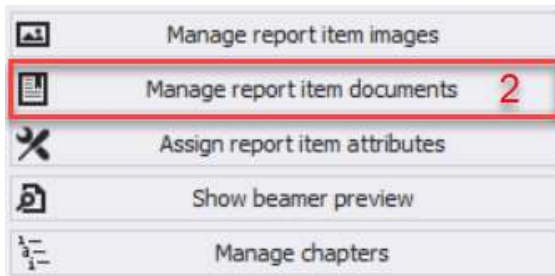
8.8.2 Advanced Settings: attachments

- Points can be supplemented with attachments
  - PDF are also printed and stamped with the report item code.
  - all others are automatically included with the e-mail dispatch

8.9 Protocol View: Video Short Training

- More information about the new reporting mask can be found in the training video at

http://www.proman.at/tutorials/intuitiv-protokollieren/

Intuitiv Protokollieren

Unser „Word" drauf: Mit der neuen Punktmaske werden Sie noch schneller und einfacher zurechtkommen als bisher. Dabei wird sie Ihnen gar nicht so neu vorkommen, denn durch die Überarbeitung sieht die Maske ganz ähnlich aus, wie Sie es von Word her kennen. Sie werden PROMAN also ganz intuitiv benutzen und sich ganz auf Ihre Besprechung konzentrieren können.

Links zu den Kapitel des Videos

Kapitel 1: Die neue Punktmaske – nun noch einfacher
Kapitel 2: Die neue Punktmaske – unser „Word"
Kapitel 3: Finden statt suchen – Informationen auf Klick
Kapitel 4: Nach dem Meeting ist vor dem Meeting – Vorbereitung leicht gemacht

9.1 Changing report item number
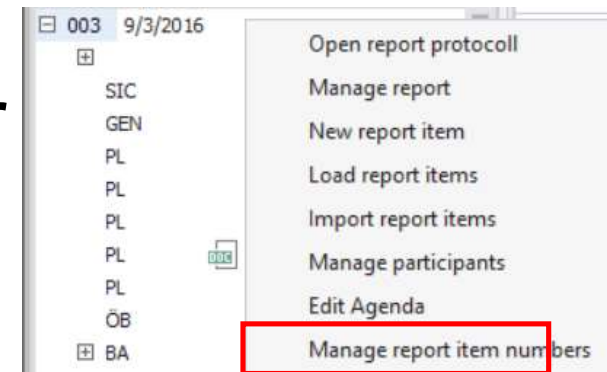
- Change number
  - It is only possible in the selected report
    - The report item must have been created in this report

- Report item number
  - is consecutive per report
  - Unique for the report collection
  - Consists of
    - Report number
    - Report Item number
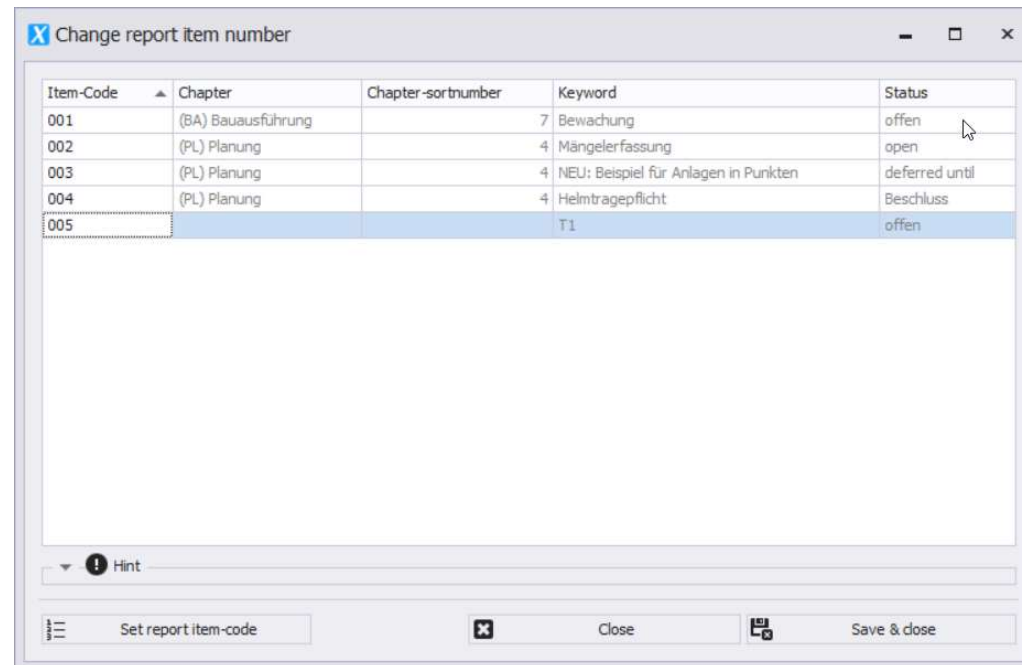
9.1 report item number: Structure

- First occurrence of item
  - Item number

- Item will be continued at further meetings
  - Report number
  - Date of meeting

Chapter / Report number / Item number

0.2		Genehmigungen		
0.2 001.002		**Genehmigung Umsetzen Masten**		open
001 / 21.08.2014		Im Baufeld befinden sich zwei Masten, Die Genehmigung für das Umsetzen der Masten durch die OZB erfolgt frühestens ab 22.9.2014	Alle Projektpartner	
002 / 27.08.2014		Es wurde ein Vorschlag für die Kabelführung im Mast erarbeitet. Dieser ist von der Firma Schillingzu überprüfen (Koordination durch Herr Busch). Weiters sind die statischen Berechnungen der Fa. Schilling beizubringen.	Busch, Busch & Czerny	
003 / 03.09.2014		Die Maststatik ist noch immer ausständig und in weiterer Folge auch die Schalungs- und Bewehrungspläne für die Mastfundamente. Die Baugruben für die Fundamente werden von der Baufirma hergestellt.	Rauscher, Holzer Bau	10.09.2014
			Busch, Busch & Czerny	03.09.2014

9.5 Examples report item status

- Status
  - completed
  - One time info
  - Permanent info
    - Is printed out as info, but it can be changed
  - in progress
  - canceled
  - open
    - With the default settings, open will not be printed
  - Deferred until

completed
03.09.2014

one time info
03.09.2014

in progress

canceled

in progress   in progress
01.09.2014   03.09.2014

03.09.2014

01.09.2014

Status	inbearbeitung_Standard	
Status text	Statusname	Preview
	Beschluss	**Beschluss**
Show calendar week	DauerInfo_Standard	permanent info
Do not print item	erledigt_Standard	completed
use as Item-Template	inbearbeitung_Standard	in progress
Additional item inf	Info_Standard	one time info

deferred until

9.10 reportitem: History example

0.2	Genehmigungen		
0.2 001.002	**Genehmigung Umsetzen Masten**		open
001 / 21.08.2014	Im Baufeld befinden sich zwei Masten, Die Genehmigung für das Umsetzen der Masten durch die OZB erfolgt frühestens ab 22.9.2014	All project partners	
002 / 27.08.2014	Es wurde ein Vorschlag für die Kabelführung im Mast erarbeitet. Dieser ist von der Firma Schilling zu überprüfen (Koordination durch Herr Busch). Weiters sind die statischen Berechnungen der Fa. Schilling beizubringen.	Busch, Busch & Czerny	
003 / 03.09.2014	Die Maststatik ist noch immer ausständig und in weiterer Folge auch die Schalungs- und Bewehrungspläne für die Mastfundamente. Die Baugruben für die Fundamente werden von der Baufirma hergestellt.	Rauscher, Holzer Bau	10.09.2014
		Busch, Busch & Czerny	03.09.2014

PROMAN 3.1 Lizenz: 1010/BAUB/003   Seite   2 / 4

9.2 Comments in the report & Meeting preparaton

In the comments you can write your notes for the next report

- Comments are not printed , you can only print them in the meeting preparation

9.2 Comments in the report & Meeting Preparation

Allows you to create notes for your next report.

Space for handwritten Notes
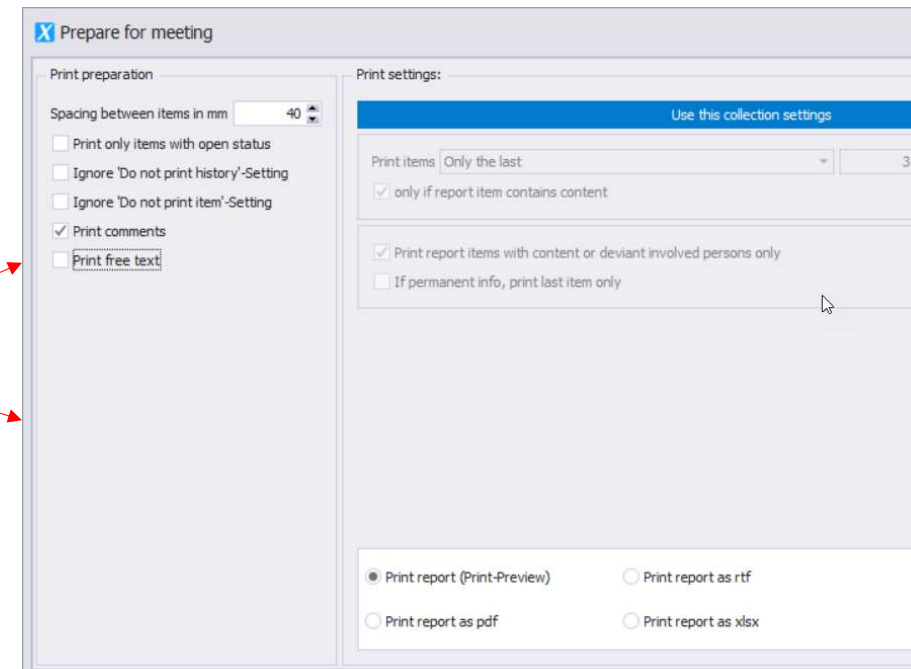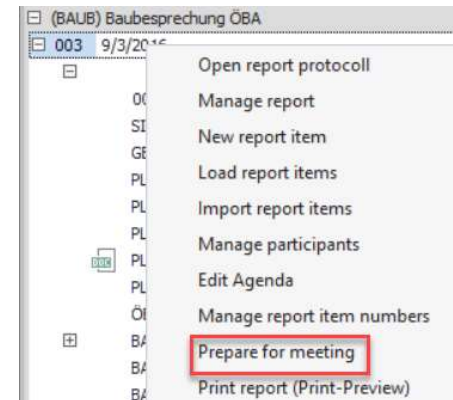
9.16 Chapters

To assign a report item to a chapter, use the drop down menu to select your desired chapter

Chapters can be changed later at any time.

9.3 report item Load&Delete

- With the option „Load report items" you can inclued report items from previous reports

  - For example,a report item was marked as closed but you need it again in the current report.

- „Delete report item":

  - Deletes the report item from the current report.
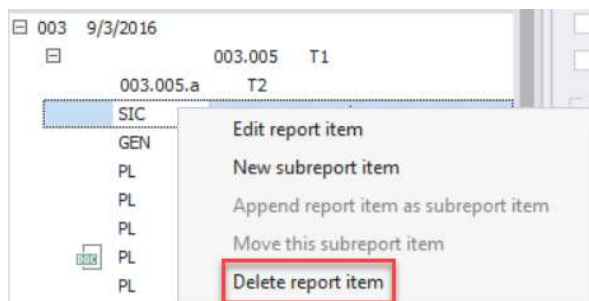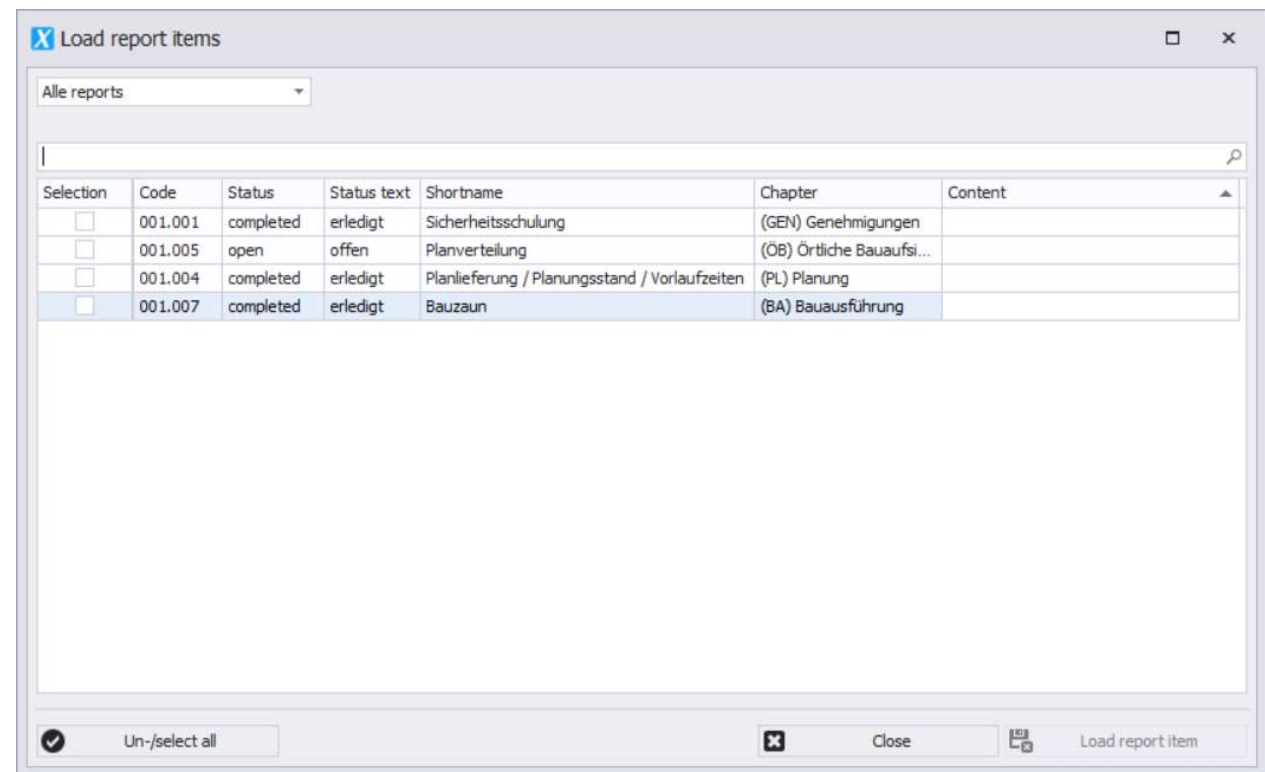
9.4 report items: attributes

Attributes can be managed via the toolbox in the report item „Assign report item attributes".
(see 1)

- Choose the desired attribute in the dropdown menu*(see 2)*

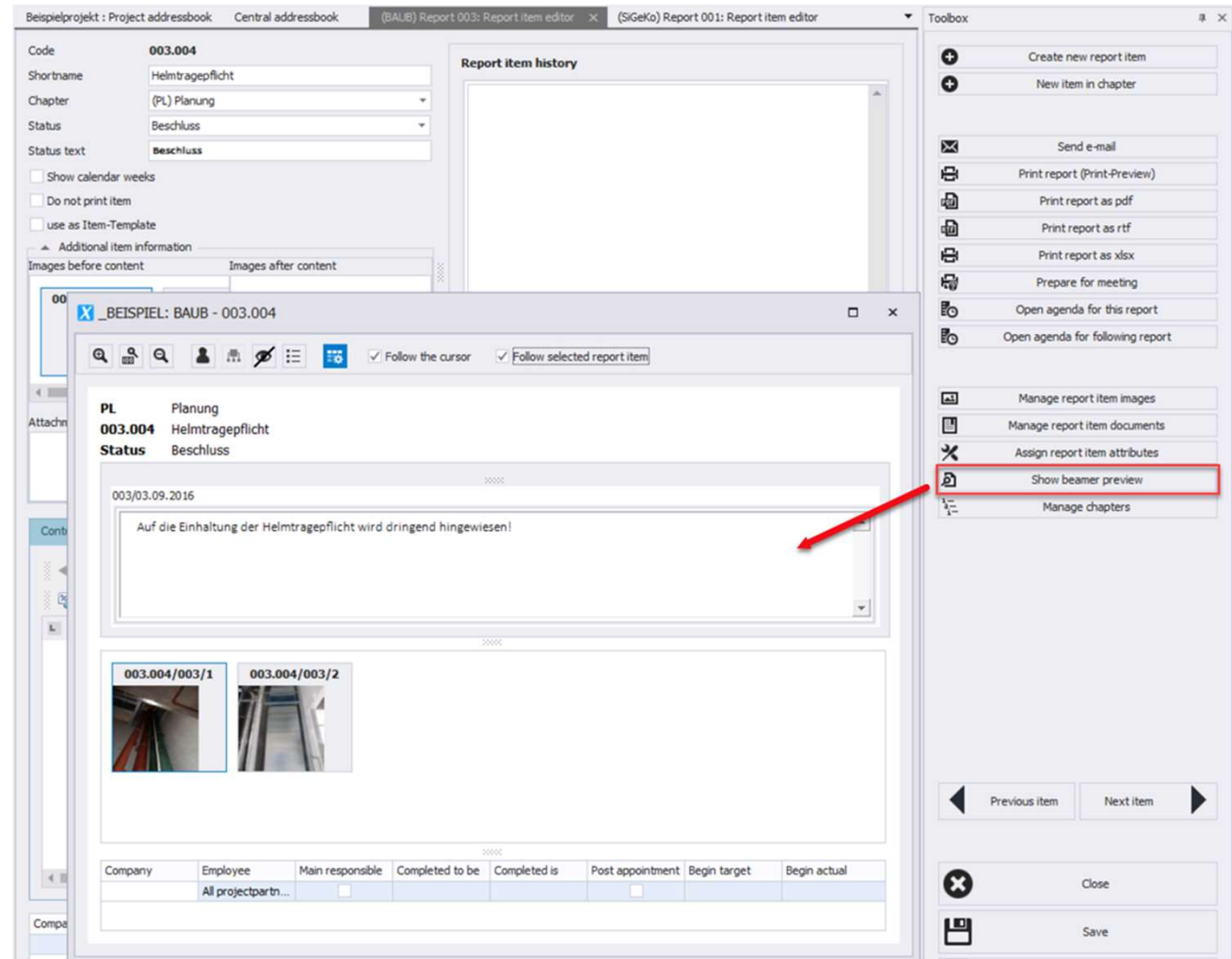- Define the value of the attribute with which the report item is to be marked.
(see 3)
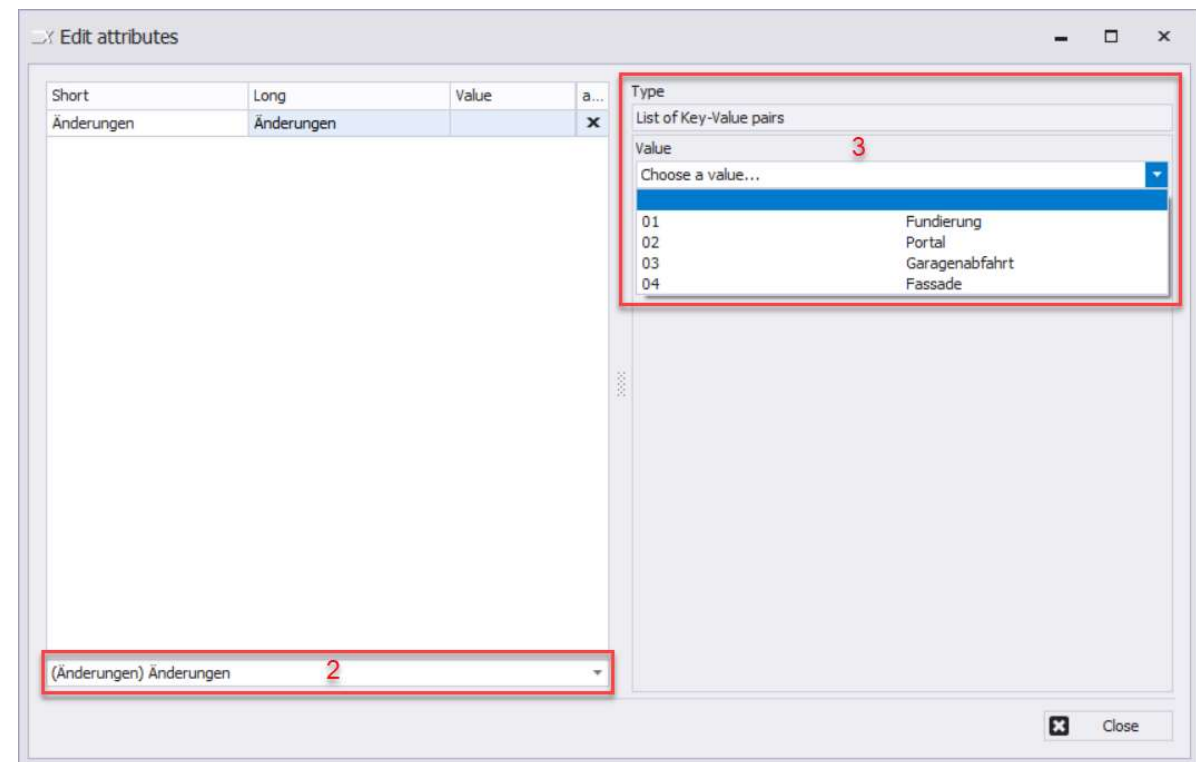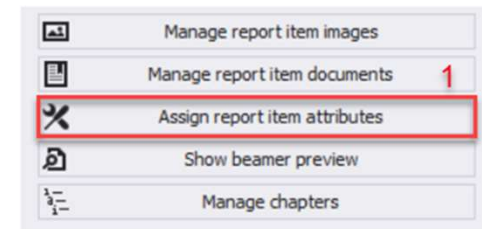
9.5 report item: beamer view

You have the option of presenting your reports live during meetings. The report items are displayed synchronously in a second mask and can be presented e.g. on a beamer.

- Images and documents can be opened with a double click

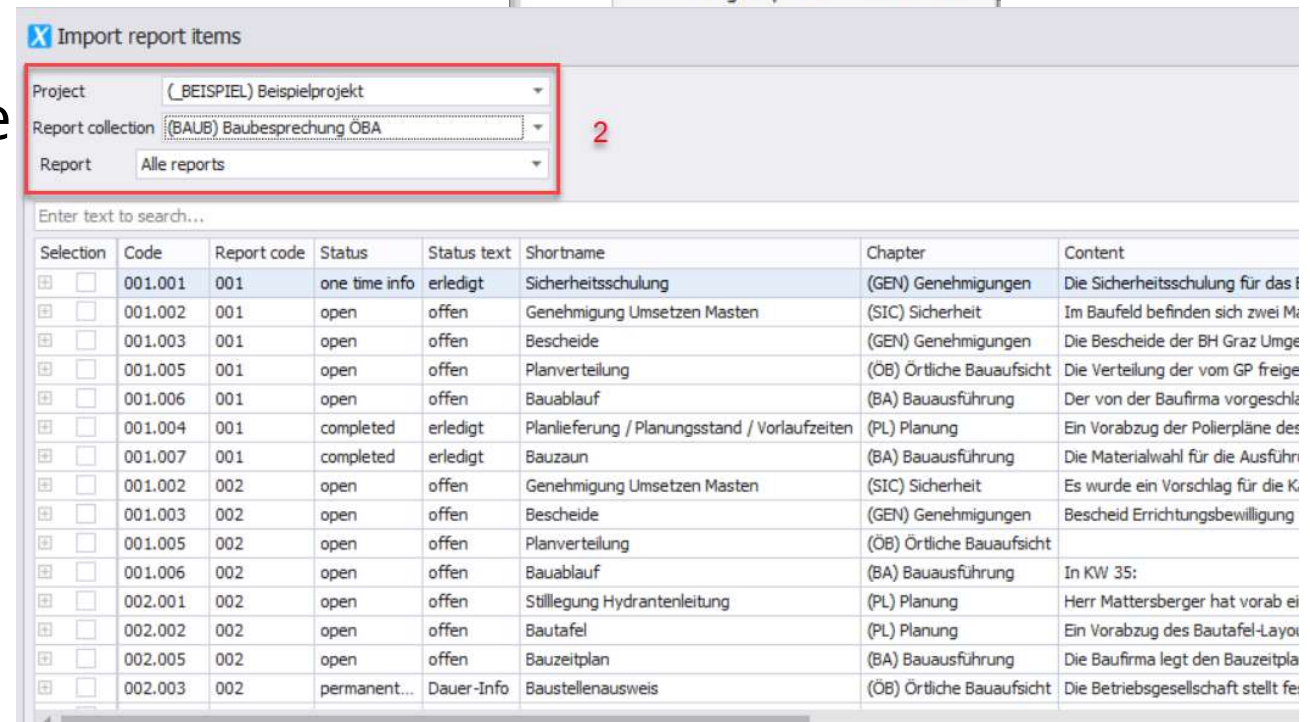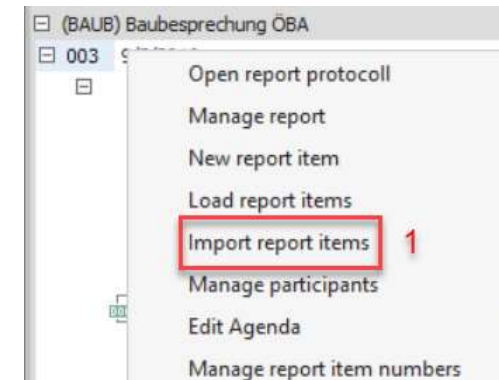# 9.6 import report items from another report collection or project

Report items can be taken from another project or report collection.

This can be very practical for example the continuation of report items with a reference to the item source.

Right-click on the report to open the "Import report items" function. *(see 1)*

Select the desired source project, report collection and report from which the items are to be loaded. *(see 2)*

9.6 import report items from another report collection or project

The search allows you to search for a specific report item title and content. (see 1)

Select the items to be imported individually (see 2) or all at once. (see 3)

9.6 import report items from another report collection or project

Individual import options can be defined for the selected report items:

Import options

Apply to history text
- ✓ Apply complete item history
- ✓ Project short name
- ☐ Report collection short name
- ☐ Report code
- ☐ Meeting date
- ☐ Old report code

History text - report item de
- ✓ Report item short name
- ✓ Content text
- ☐ Comment
- ☐ Free text

Assignments
- ☐ Chapters
- ☐ Images
- ☐ Documents
- ☐ Attributes

New report item status
- ○ like source
- ○ One time info
- ● open
- ○ closed

Close   Copy

9.6 import report items from another report collection or project

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You can insert the report items with or without source reference

- Without source reference: report item template with which you always start new projects
- With source reference: to further discuss the report item in other sessions.

003.005	**Genehmigung Umsetzen Masten**		open
	Taken from Project: , Collection:	Busch	9/23/2019
	Report No.001 from 21.08.2016, origin item: 001.002	Rauscher	10/9/2016
	Im Baufeld befinden sich zwei Masten. Die Genehmigung für das Umsetzen der Masten durch die OZB erfolgt frühestens ab 22.9.2016.		

9.7 Report item: Text and involved Examples

1			Planung		
1 002.001			**Stilllegung Hydrantenleitung**		open
002 / 27.08.2014			Herr Mattesberger hat vorab eine mündliche Zusage über die Stilllegung der das Baufeld querenden Hydrantenleitung erhalten. Eine schriftliche Bestätigung durch die Gemeinde Feldberg muss abgewartet werden.	Frank, Flughafenbetrieb Mattersberger, Plancon:	27.10.2014
003 / 03.09.2014			Die Stellungnahme der Gemeinde Feldberg ist noch ausständig.	Frank, Flughafenbetrieb Mattersberger, Plancon:	27.10.2014
1 002.002			**Bautafel**		open
002 / 27.08.2014			Ein Vorabzug des Bautafel-Layouts wird an Baufirma und ÖBA übermittelt.	Mattersberger, Plancon:	03.09.2014
003 / 03.09.2014			GP übergibt das Layout in der nächsten Bazbesprechung. Das Rendering musste neu erstellt werden.	Mattersberger, Plancon:	03.09.2014
2			Örtliche Bauaufsicht		
2 002.003			**Baustellenausweis**		one time info
002 / 27.08.2014			Die Betriebsgesellschaft stellt fest, dass Baustellenausweise erforderlich sind. Diese werden von der ÖBA ausgestellt. Der genaue Ausstellungsablauf für die einzelnen Gewerke wird von der ÖBA noch bekanntgegeben.	Herr Schnatter, GPS	03.09.2014
003 / 03.09.2014			Es werden keine Baustellenausweise ausgegeben. Die beauftragten Firmen haben stattdessen laufend aktuelle Mitarbeiterlisten an die ÖBA zu übermitteln (Name, Geburtstag, von-bis auf der Baustelle). Die ÖBA wird diese Angaben stichprobenweise überprüfen.	Alle Teilnehmer	

| Item	Subject	cr	Responsible	Deadline
0.2 001.003	**Bescheide**			open
001 / 21.08.2014	Die Bescheide der BH Graz Umgebung ergehenlt. Herrn Frank am 22.8.2014 an die Betriebsgesellschaft. Herr Frank wird sie sofort an die Projektpartner verteilen.		Frank, Flughafenbetrieb	22.08.2014
002 / 27.08.2014	Bescheid Errichtungsbewilligung wurde am 27.8.2014 von Herrn Frank verteilt. • Noch ausständige Bescheide: • Wasserrecht • Betriebseinschränkung • Versetzuen Mast • Gepäckförderanlage		Frank, Flughafenbetrieb	22.08.2014
003 / 03.09.2014	Bescheid für die Betriebseinschränkung wurde von der Betriebsgesellschaft am 28.8.2014 an die ÖBA übergeben.		Frank, Flughafenbetrieb Herr Schnatter, GPS	22.08.2014

9.8 Invitation & Agenda Function

With the Agenda function, invitations with agenda data can be created and automatically sent.

The function can be accessed with the right mouse button on the report collection / "Edit next agenda".

The agenda of an already generated report can be reached directly by right-clicking on the desired report.
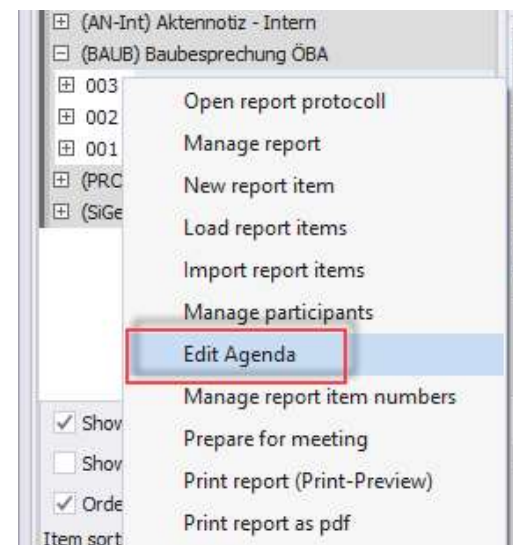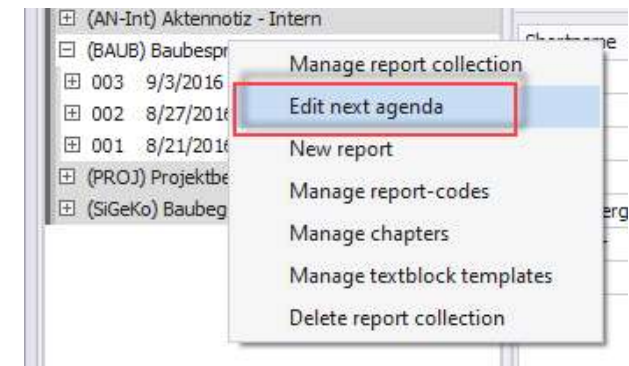
9.8 Invitation & Agenda Function

A new tab will then open. The following settings can be made there.

• Name and appointment date

• Invited with time and comment

The entered data is automatically copied to the next agenda.

9.8 Invitation & Agenda Function

PRO MAN

In the toolbox you can select which elements should be used to create the agenda list. After clicking on "Add selected", the agenda is automatically created in the "Free text" tab. This can then be edited manually:

10. Types of output

- Right mouse click on the report - select „ **print report as PDF".**
  - PDF attachments are automatically created together with the report in a file, so no attachments are lost.
- Send email
  - reports
  - attachments

10.1 E-mail: dispatch

Right-click on the report and select **Send e-mail** (see 1).

- Choose between "Use text blocks" or "Free text" (see 2). With predefined text blocks you save time when sending!

- The subject is filled automatically, if desired - select the format for "Edit standard subject" once (see 3).

- When using text blocks, a preview of the final text is created (see 4).
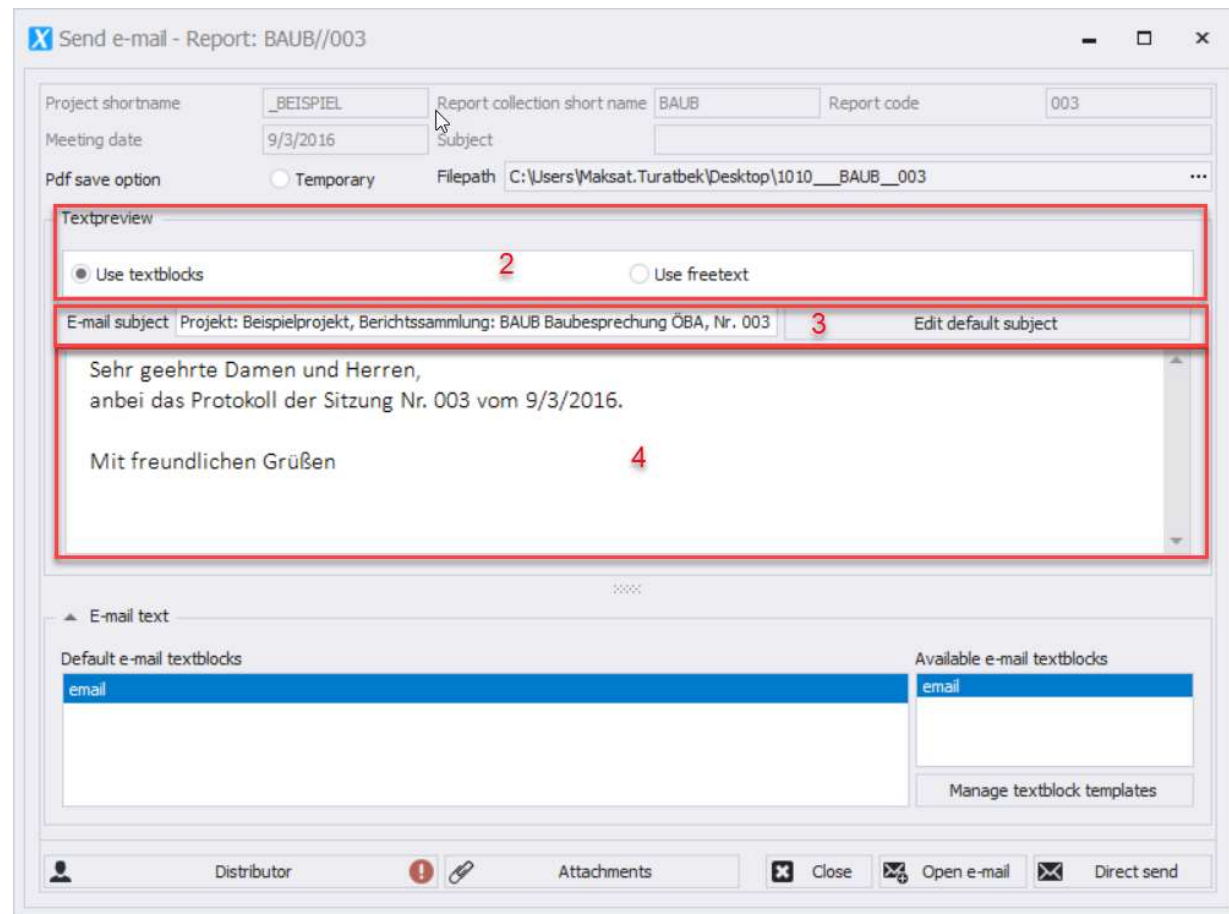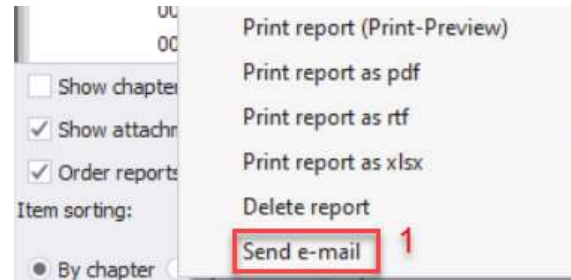
10.1 E-mail: dispatch

- The report is automatically attached to the e-mail.

- You can manage additional attachments (see 2).

- The distribution list is taken from the subscriber/distributor of your report and can be edited individually (see 1).
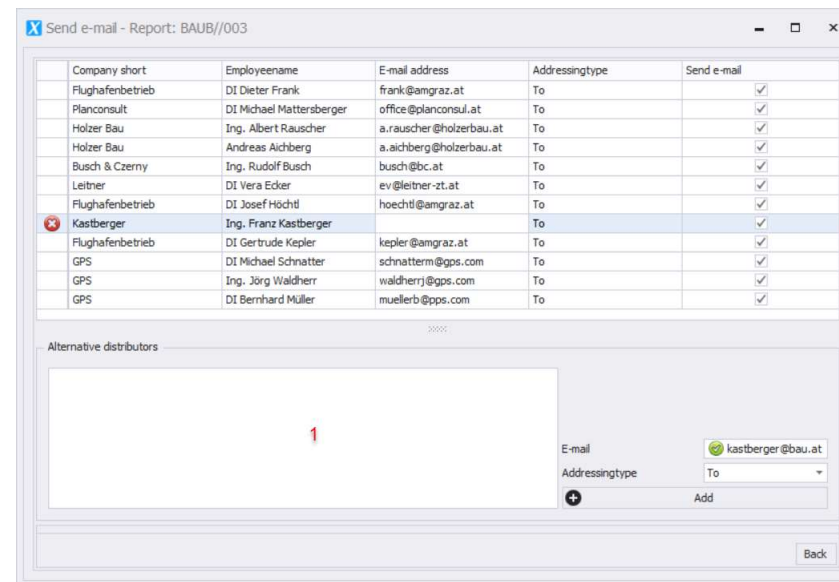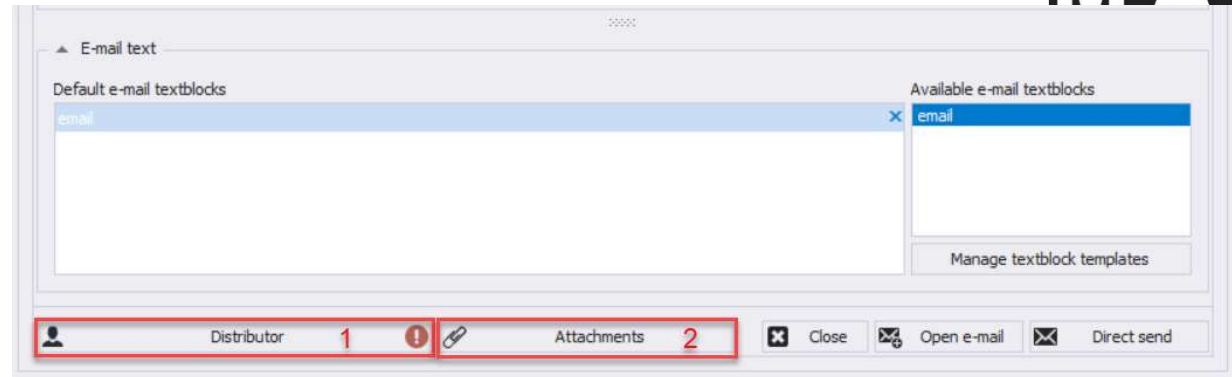
10.2 Sending an e-mail: text blocks

- enable fast and standardised transmission of reports
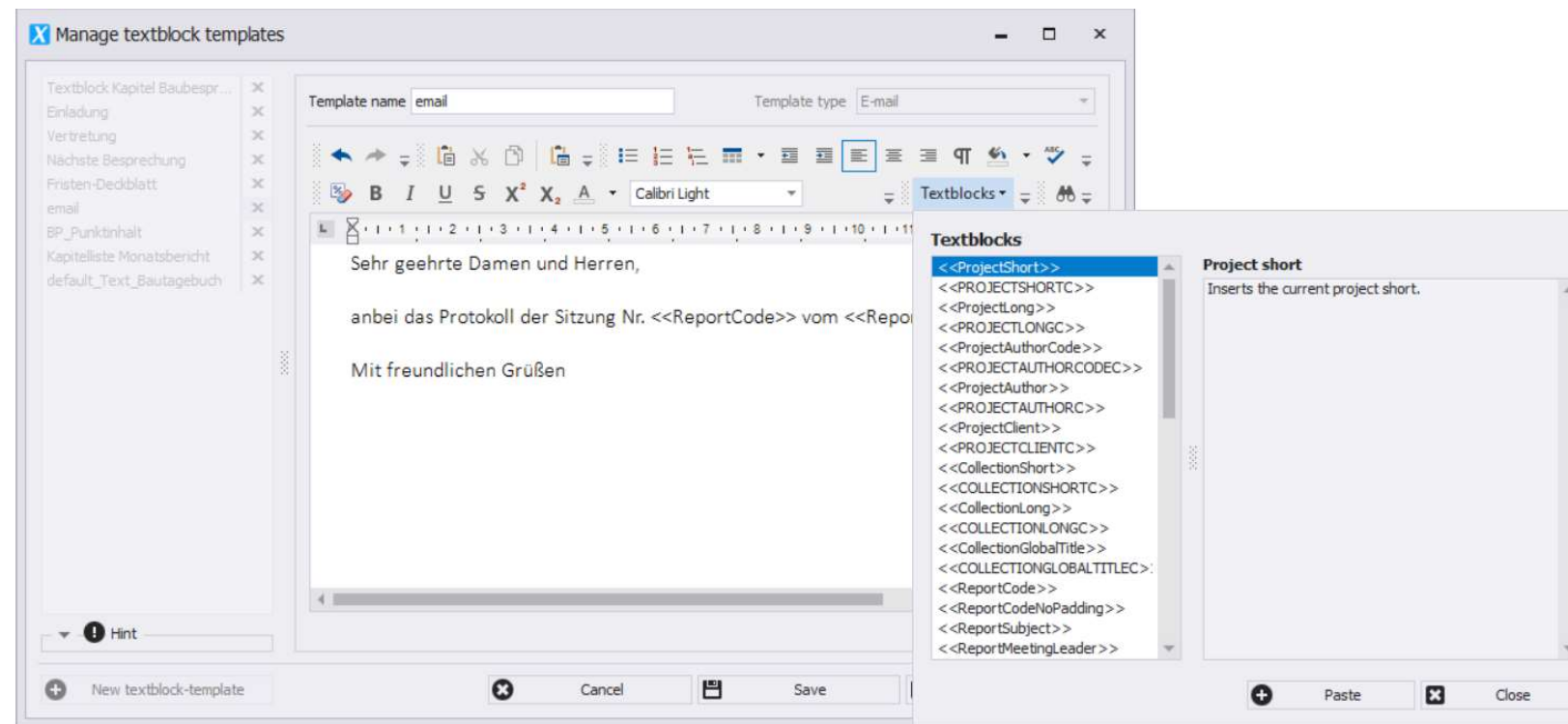
12. evaluation

Default: all content available

12. evaluation

- filter options
  - folders
  - report collections
  - reports
  - Report items
  - item status
  - Involved
    Companies
    person
  - Keywords (free text)
  - Attributes

13. Project-Cockpit

Via View -> "Show **Project Cockpit"** you can access your individual task management for your project. (see 1).

Here you have an overview of all tasks!

13. Project-Cockpit

- tasks are automatically generated from the report items of the current reports of your project (see 1).

- You can filter by involved (see 2).

- By right clicking you can open the report item editor.
  - Add a reminder and the task will be displayed in the agenda on the reminder day (see 3).
    A reminder is marked with the symbol.
  - If no reminder is added, the task will appear in your agenda 7 days before the target finish date.
  - If a start is entered, the task also appears in the time axis "Calendar view 2".

13. project cockpit

- Reminders can easily be created independently from the current reports using "Create todo" in the toolbox (see 1).

- Drag the desired project partner (see 2) into the task window (see 3).

  - Choose between the options 1) Phone call, 2) E-mail, 3) To-Do - the data such as e-mail address and phone number are automatically taken over and called up when you click on the icon (see 4).

  - On the reminder date, the tasks appear in your agenda. (see 5).

  - Tasks can be marked as completed. If the project cockpit is updated (see 6), the completed

13. Project-Cockpit

- Meetings are displayed in your agenda and calendar (see 1).
  - In the current report, under Next Meeting, add the date and time.
- There are two calendars in your project cockpit for a better overview.
  - Classic day view for task management (see 2)
  - Calendar with timelines to display your project progress (see 3)

calendar view

14. Example: printout of participants list

PRO MAN

Participants / Distributors:

Name	Company	E-Mail	present	Distr.	temporary
Ing. Jörg Waldherr	GPS	waldherrj@gps.com	●	●	○
Ing. Rudolf Busch	Busch & Czerny	busch@bc.at	●	●	○
DI Gertrude Kepler	Flughafenbetrieb	kepler@amgraz.at	●	●	○
DI Vera Ecker	Leitner	ev@leitner-zt.at	●	●	○
Andreas Aichberg	Holzer Bau	a.aichberg@holzerbau.at	●	●	○
DI Dieter Frank	Flughafenbetrieb	frank@amgraz.at	○	●	○
DI Bernhard Müller	GPS	muellerb@pps.com	○	●	○
DI Michael Schnatter	GPS	schnatterm@gps.com	●	●	○
DI Josef Höchtl	Flughafenbetrieb	hoechtl@amgraz.at	●	●	○
Ing. Franz Kastberger	Kastberger		○	●	○
Ing. Albert Rauscher	Holzer Bau	a.rauscher@holzerbau.at	○	●	○
DI Michael Mattersberger	Planconsult	office@planconsul.at	●	●	●

Templates are customizable

Template Example 1, e.g:
- email address
- Temporary presence

Template Example 2
- Invitation column for the next report

Participants / Distributors:

Name	Company	E-Mail	present	Distr.	Inv.
Ing. Jörg Waldherr	GPS	waldherrj@gps.com	●	●	●
Ing. Rudolf Busch	Busch & Czerny	busch@bc.at	●	●	●
DI Gertrude Kepler	Flughafenbetrieb	kepler@amgraz.at	●	●	●
DI Vera Ecker	Leitner	ev@leitner-zt.at	●	●	●
Andreas Aichberg	Holzer Bau	a.aichberg@holzerbau.at	●	●	○
DI Dieter Frank	Flughafenbetrieb	frank@amgraz.at	○	●	●
DI Bernhard Müller	GPS	muellerb@pps.com	○	●	○
DI Michael Schnatter	GPS	schnatterm@gps.com	●	●	○
DI Josef Höchtl	Flughafenbetrieb	hoechtl@amgraz.at	●	●	●
Ing. Franz Kastberger	Kastberger		○	●	○
Ing. Albert Rauscher	Holzer Bau	a.rauscher@holzerbau.at	○	●	○
DI Michael Mattersberger	Planconsult	office@planconsul.at	●	●	○

14.1 Report Collection: Print Settings 1

- Different print settings can be assigned to each report collection. Thus, for example, file notes can be printed differently than construction meetings.

- In the toolbox *(see 1),* the individual settings can be specifically changed.

- If a template already exists, the settings can also be completely adopted from another project or report collection *(see 2).*
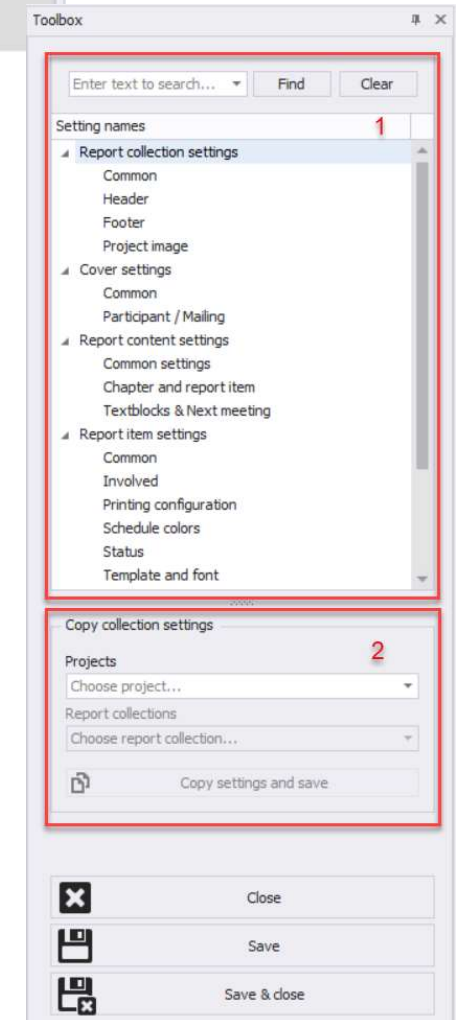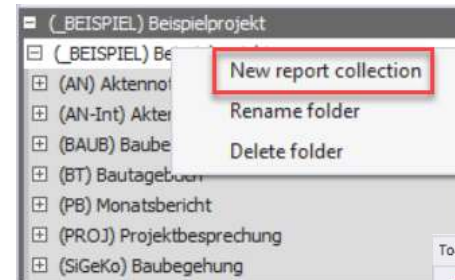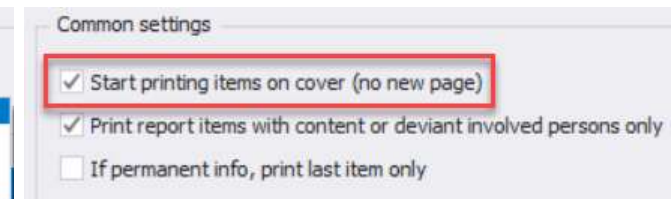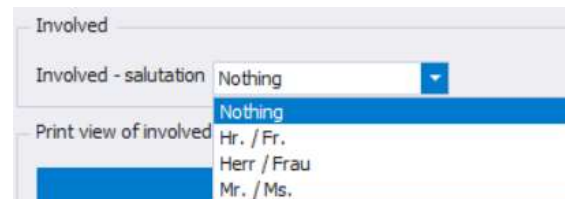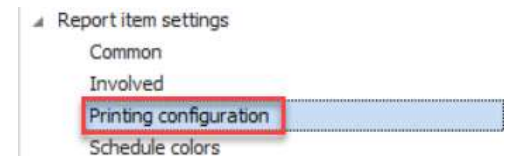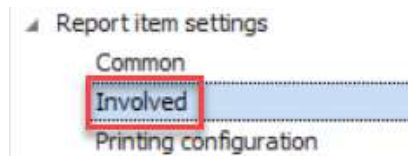
14.2 Report Collection: Print Settings 2

Important Settings in the
report item settings Tab

- *Start printing items on cover* - if you have listed only a few participants, this allows you to start with your report items on the first page of the cover page.
- If you wish, you can select the salutations for the names of the participants or distribution list

14.3 Report Collection: Print Settings 3

PRO MAN

Important Settings in the **Report Contents** Tab

- All chapters in which report items are printed are printed as a list at the beginning.

- Sorting of the report items by item number or by chapter (see following foil)
  Note: When sorting by item number, the chapters are not printed.

- Printing range of the report items
  - only the last e.g. 5 entries to this point and or where text is contained (see following slide)
    - Important for report items that remain open for a long time and are discussed again and again.

Next Meeting:
Number: 004
Subject: Planung
Date: 9/10/2016
Time: from 9:00 AM till 3:00 PM
Meetingplace: GPS-Container
Company: Flughafen BetriebsgesmbH
Address: AT 8070 Graz Flughafenstr. 21

Table of Contents
(ALG) Allgemein 2
 (SIC) Sicherheit 2
     001.002 Genehmigung Umsetzen Masten 2
     003.005 Genehmigung Umsetzen Masten 2
 (0.2) Genehmigungen 2
     001.003 Bescheide 2
(PL) Planung 4
     002.001 Stilllegung Hydrantenleitung 4
     002.002 Bautafel 4
     003.002 Helmtragepflicht 4
     003.003 Mängelerfassung 4

PROMAN X License: 000/A1 PROMAN   1010///BAUB//003   Page: 1 / 8

▲ Report content settings
    Common settings
    Chapter and report item
    Textblocks & Next meeting

▲ Report item settings
    Common
    Involved
    Printing configuration
    Schedule colors

Chapter settings for print
☐ Print chapters without content
☐ Do not print chapter titles
☑ Print each base chapter on new page

Print settings
Print items   Only the last   5 ⏷ contents
☑ only if report item contains content

Print sorting
Print report items sorted by   by chapter
                                by item-code
Chapter settings for print   by chapter

14.4 Example printout sorting by item number and chapter

BA   **Bauausführung**

BAUB 001.006   **Bauablauf**   open

001/21.08.2016 — Der von der Baufirma vorgeschlagene Bauablauf für die kommenden zwei Wochen umfasst folgende Tätigkeiten: — Alle Teilnehmer
- Erstellen des Bauzeitplans
- Aufstellen des Bauzauns
- Einrichten der Containersiedlung
- Ausstellen des Krans
- Beschilderung
- Einholen und Überprüfen des Bombenkatasters

002/27.08.2016 — In KW 35: — Alle Teilnehmer
- Aufstellen des fixen und des prov. Bauzauns
- Einrichten Containersiedlung
- Aufstellen Kran

In KW 36:
- Anliefern Baugeräte
- Beginn Abbruch Betonflächen am 2.9.2016

003/03.09.2016 — Für das Errichten des Bauzauns am Vorfeld sind Schweißarbeiten notwendig. Hierfür muss die Baufirma von der Betriebsgesellschaft die Freigabe einholen. — Flughafenbetrieb Rauscher — 08.09.2016

Attribute: Anmerkung: Mehrkosten, Terminänderung, Umplanung

BAUB 002.004   **Offene Unterlagen**   completed 8/8/2016

002/27.08.2016 — Folgende Unterlagen/Bestätigungen sind der ÖBA zu übergeben: — Rauscher — 03.09.2016
- K7-Blätter
- Bieterlückenverzeichnis
- Unterfertigte Pläne
- Bestätigung Massenkontrolle

003/03.09.2016 — K7-Blätter werden in der nächsten Baubesprechung — Rauscher — 03.09.2016

übergeben.

1   **Planung**

BAUB 002.001   **Stilllegung Hydrantenleitung**

002/27.08.2014 — Herr Mattesberger hat vorab eine mündliche Zusage über die Stilllegung der das Baufeld querenden Hydrantenleitung erhalten. Eine schriftliche Bestätigung durch die Gemeinde Feldberg muss abgewartet werden. — Frank Mattersberger — 27.10.2014

003/03.09.2014 — Die Stellungnahme der Gemeinde Feldberg ist noch ausständig. — Frank Mattersberger — 27.10.2014

BAUB 002.002   **Bautafel**

002/27.08.2014 — Ein Vorabzug des Bautafel-Layouts wird an Baufirma und ÖBA übermittelt. — Mattersberger — 03.09.2014

003/03.09.2014 — GP übergibt das Layout in der nächsten Bazbesprechung. Das Rendering musste neu erstellt werden. — Mattersberger — 03.09.2014

2   **Örtliche Bauaufsicht**

BAUB 002.003   **Baustellenausweis**   one time info

002/27.08.2014 — Die Betriebsgesellschaft stellt fest, dass Baustellenausweise erforderlich sind. Diese werden von der ÖBA ausgestellt. Der genaue Ausstellungsablauf für die einzelnen Gewerke wird von der ÖBA noch bekanntgegeben. — Schnatter — 03.09.2014

003/03.09.2014 — Es werden keine Baustellenausweise ausgegeben. Die beauftragten Firmen haben stattdessen laufend aktuelle Mitarbeiterlisten an die ÖBA zu übermitteln (Name, Geburtstag, von-bis auf der Baustelle). Die ÖBA wird diese Angaben stichprobenweise überprüfen. — Alle Teilnehmer
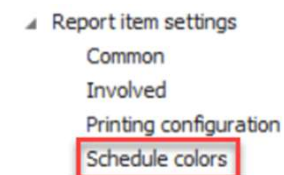
14.5 Report collection: Print Settings 4

- Formatting of the item code:
  - chapters Short form
  - report collection Short form
  - item or report number only

- Print view of involved persons in report items: same as in report item, person, company, function, short or longname

- The report can contain various status types : Info, permanent Info, open, in progress and closed

14.6 Examples printout
Representation of the item code

Report collection shortname

Chapter Code

14.7 Examples printout
Mention of the involved in the report item

Same as in report item

Person & function

14.8 Report Collection: Print Settings 5

- Under schedule color-settings, overdue or due appointments can be highlighted in color

- You should always define the header and footer in the project as a whole, but if you want to add the client's logo in a report collection, for example, you can override the project settings in the print settings for this report collection.

Schedule color-settings

Overdue	**B**	Fontcolor	255, 0, 0	Backcolor	255, 255, 255
Due	**B**	Fontcolor	255, 128, 64	Backcolor	255, 255, 255
Not yet due	**B**	Fontcolor	0, 0, 0	Backcolor	255, 255, 255

Apply colors

Apply to following states
- ✓ One-time info
- ✓ Permanent info
- ✓ open
- ✓ in progress
- ☐ closed

Apply to following dates
Relation date current report
- ✓ Current items
- ☐ Prior items

⊿ Report collection settings
   Common
   Header
   Footer
   Project image

⊿ Report item settings
   Common
   Involved
   Printing configuration
   Schedule colors

14.9 Example printout: New meeting content bold and appointments highlighted in color according to due date

PRO MAN

1	Planung			
BAUB 002.001	Stilllegung Hydrantenleitung			open
002/27.08.2014	Herr Mattesberger hat vorab eine mündliche Zusage über die Stilllegung der das Baufeld querenden Hydrantenleitung erhalten. Eine schriftliche Bestätigung durch die Gemeinde Feldberg muss abgewartet werden.	Frank Mattersberger	27.10.2014	
003/03.09.2014	**Die Stellungnahme der Gemeinde Feldberg ist noch ausständig.**	Frank Mattersberger	27.10.2014	
BAUB 002.002	**Bautafel**			open
002/27.08.2014	Ein Vorabzug des Bautafel-Layouts wird an Baufirma und ÖBA übermittelt.	Mattersberger	03.09.2014	
003/03.09.2014	**GP übergibt das Layout in der nächsten Bazbesprechung. Das Rendering musste neu erstellt werden.**	Mattersberger	03.09.2014	

2	Örtliche Bauaufsicht			
BAUB 002.003	**Baustellenausweis**			Info
002/27.08.2014	Die Betriebsgesellschaft stellt fest, dass Baustellenausweise erforderlich sind. Diese werden von der ÖBA ausgestellt. Der genaue Ausstellungsablauf für die einzelnen Gewerke wird von der ÖBA noch bekanntgegeben.	Herr Schnatter	03.09.2014	
003/03.09.2014	**Es werden keine Baustellenausweise ausgegeben. Die beauftragten Firmen haben stattdessen laufend aktuelle Mitarbeiterlisten an die ÖBA zu übermitteln (Name, Geburtstag, von-bis auf der Baustelle). Die ÖBA wird diese Angaben stichprobenweise überprüfen.**	All participants		

BAUB 002.004	Offene Unterlagen			completed
002/27.08.2014	Folgende Untzerlagen/Bestätigungen sind der OBA zu übergeben: • K7-Blätter • Bieterlückenverzeichnis • Unterfertigte Pläne • Bestätigung Massenkontrolle	Rauscher	03.09.2014	
003/03.09.2014	• **K7-Blätter werden in der nächsten Baubesprechung übergeben** • **Bieterlückenverzeichnis erledigt** • **Pläne werden unterfertigt** • **Massendifferenzliste wird bis zur nächste Baubesprechung an die ÖBA übermittelt**	Rauscher	03.09.2014	
BAUB 002.005	Bauzeitplan			open
002/27.08.2014	Die Baufirma legt den Bauzeitplan in der nächsten Baubesprechung vor. Zuvor wird er am Montag 9:00 Uhr mit der ÖBA abgestimmt.	Herr Schnatter Rauscher	01.09.2014	
003/03.09.2014	**Vorabzug des Bauzeitplans wurde vorgelegt. Abgestimmte Version wird in einer Woche verteilt.**	Herr Schnatter Rauscher	01.09.2014	

14.10 Examples printout:
Change status settings & create your own statuses

- You can easily change the formatting of existing statuses
- In the bottom line you can create your own status at any time, e.g.
  - Decision, CRQ, determination
  - Open with traffic light colours (red, orange, green)

Name	Statustype	Displaytext	Font	Font size	Bold	Italic	Underlined	Alignment	Backgroundcolor	Default
Beschluss	one time info	**Beschluss**	Calibri Light	10	✓	☐	☐	Left	▭ 255. 255. …	☐
DauerInfo Stan…	permanent Info		Calibri Light	10	✓	☐	☐	Left	▭ 255. 255. …	✓
erledigt Standard	completed		Calibri Light	10	✓	✓	☐	Left	▭ 255. 255. …	✓
inbearbeitung S…	in progress		Calibri Light	10	✓	☐	☐	Left	▭ 0. 255. 25…	✓
Info Standard	one time info		Calibri Light	10	✓	☐	☐	Left	▭ 255. 255. …	✓
offen Standard	open		Calibri Light	10	✓	☐	☐	Left	▭ 255. 255. …	✓
storniert Stand…	canceled		Calibri Light	10	✓	☐	☐	Left	▭ 0. 255. 25…	✓
Wiedervorlage …	Resubmission		Calibri Light	10	✓	☐	☐	Left	▭ 0. 255. 25…	✓
zurückgestellt S…	deferred until		Calibri Light	10	✓	☐	☐	Left	▭ 255. 255. …	✓
					▣	▣	▣		▭	▣

Toolbox

Enter text to s ▾ | Find | Clear

Setting names
- Footer
- Project image
- Cover settings
  - Common
  - Participant / Mailing
- Report content settings
  - Common settings
  - Chapter and report item
  - Textblocks & Next meeting
- Report item settings
  - Common
  - Involved
  - Printing configuration
  - Schedule colors
  - Status
  - Template and font
- E-mail and Agenda
  - E-mail: report textblocks
  - E-mail: agenda textblocks
  - Agenda defaults & textblocks
- Print templates
  - Common & Default fonts

15. print layout

- Creation of templates for
  - Front page
    - Report core data
    - Participants
  - Report content
    - chapters
    - Report item

- Standard templates are included. If nothing else is defined, these are used.

15.1 Print Layout: report core data

- Select desired template
- Standard templates cannot be edited
  - If desired, a copy can be made for further processing.
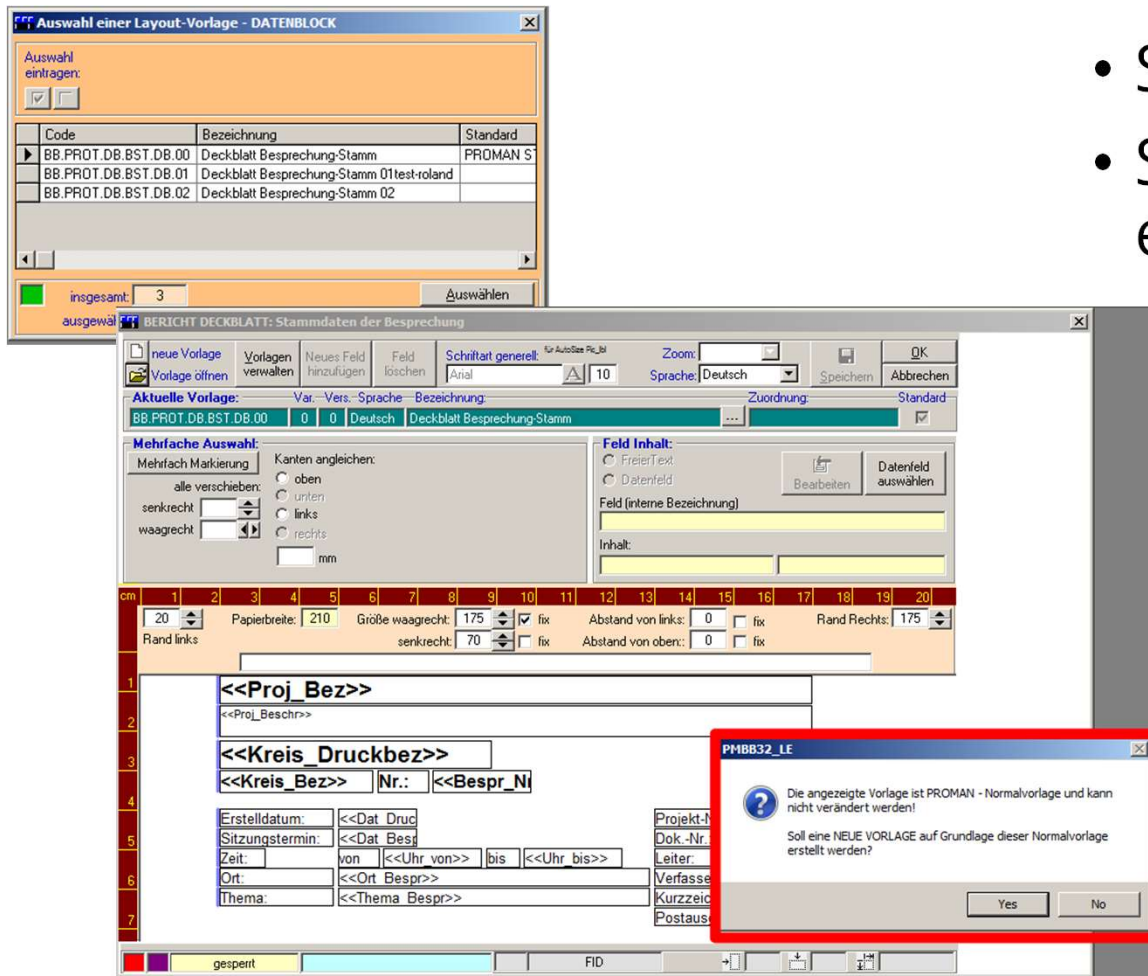
15.1 Print Layout: report core data

- Fields can easily be extended
  - Free text
  - data field

- positioning
  - On cm position
  - Using the neighbouring fields (e.g. to the right of ..)

15.1 Print Layout: report core data

- The data fields make it easy to automatically print data from the project core data.

- At runtime the placeholder is replaced with the correct data of the project

15.1 Print Layout: report core data

- The fields can be easily positioned
- Empty fields can be hidden
- Font can be configured per text, element or entire cover sheet

15.2 print layout: participants / distribution list

- The columns can be freely defined
  - content
  - title
  - width
  - font

15.3 print layout: temporary

1. Add the „temporary" column to the template

2. You can enter the time from / to in the participant list (the exact time is not required).

3. Expression: The new column shows the participant who is only temporary in the session.

15.4 print layout: chapters
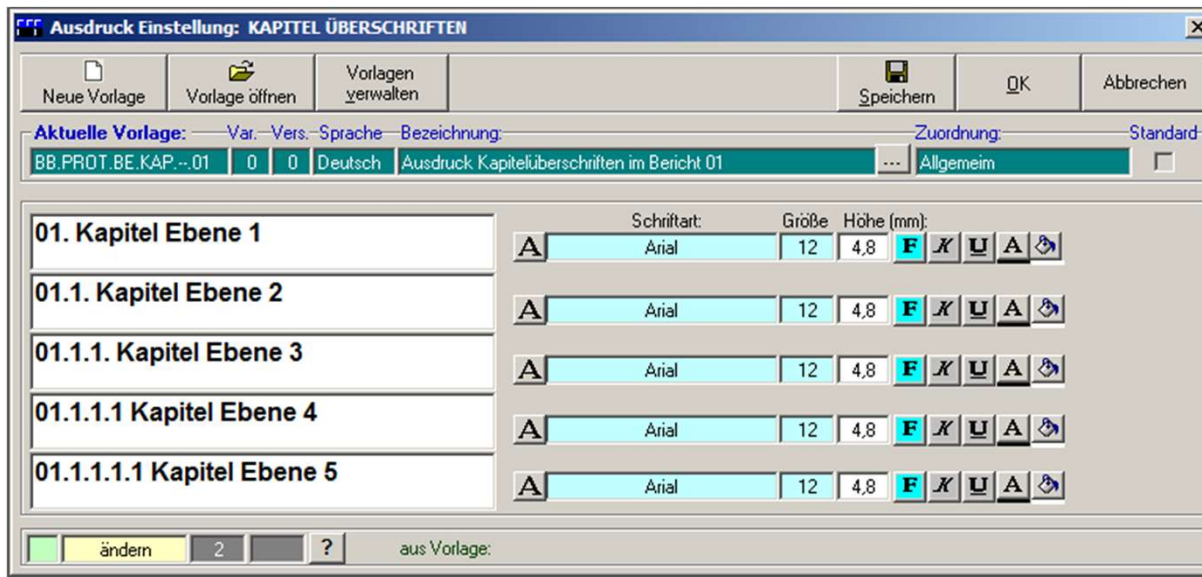
Design of chapters :
- font
- Bold, italic, underline
- background color
- Per level

15.5 printlayout: report item

16. user administration and rights control
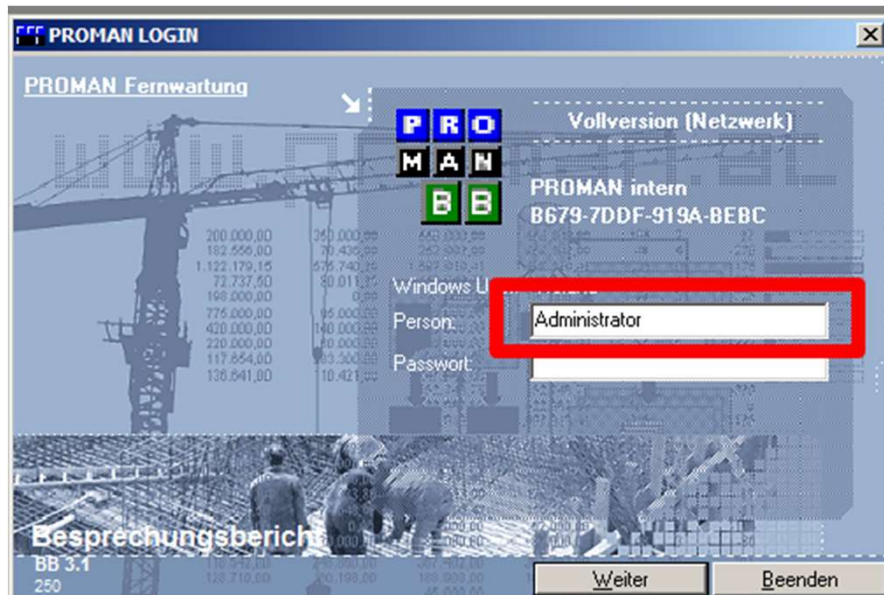
- With the link admin (PM_Admin1.exe) possible
  - Login as "Administrator
- User
  - create
  - delete
  - Change password
  - release a blocked license

16.1 User Administration
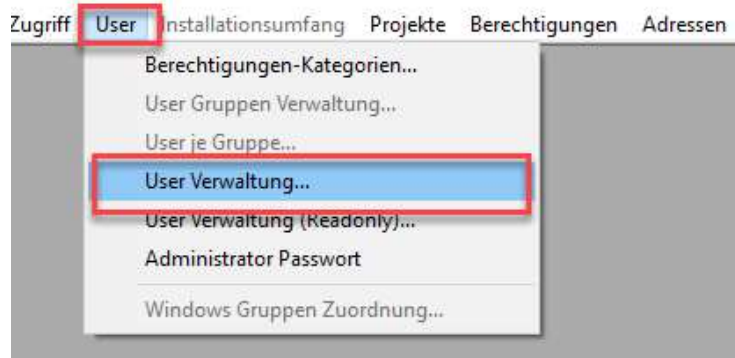
- New
  - Create user
- Delete
  - Delete user
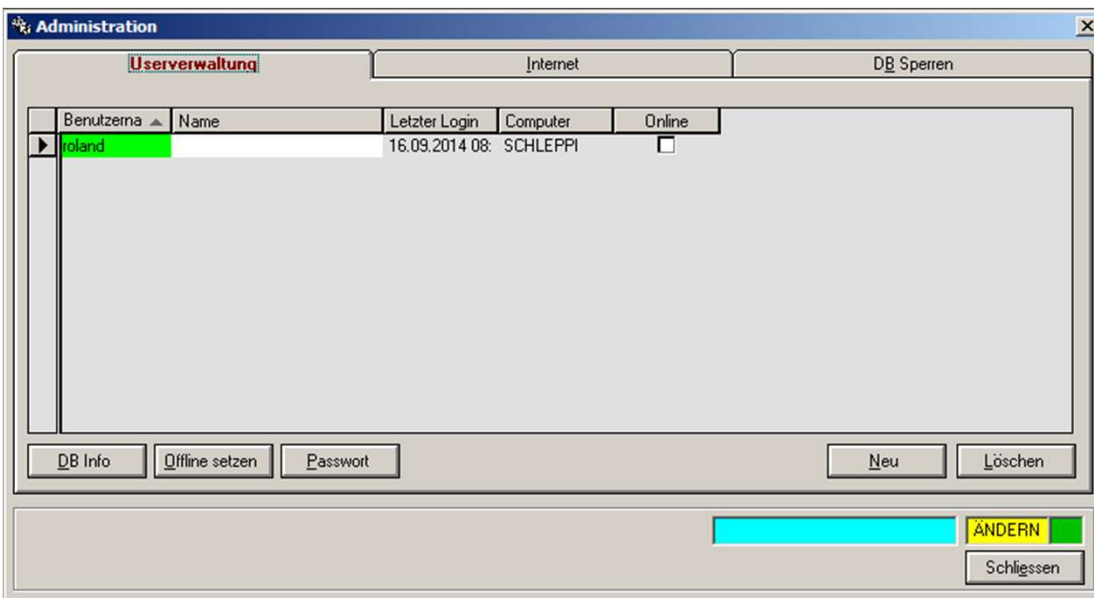
16.1 Benutzer Verwaltung
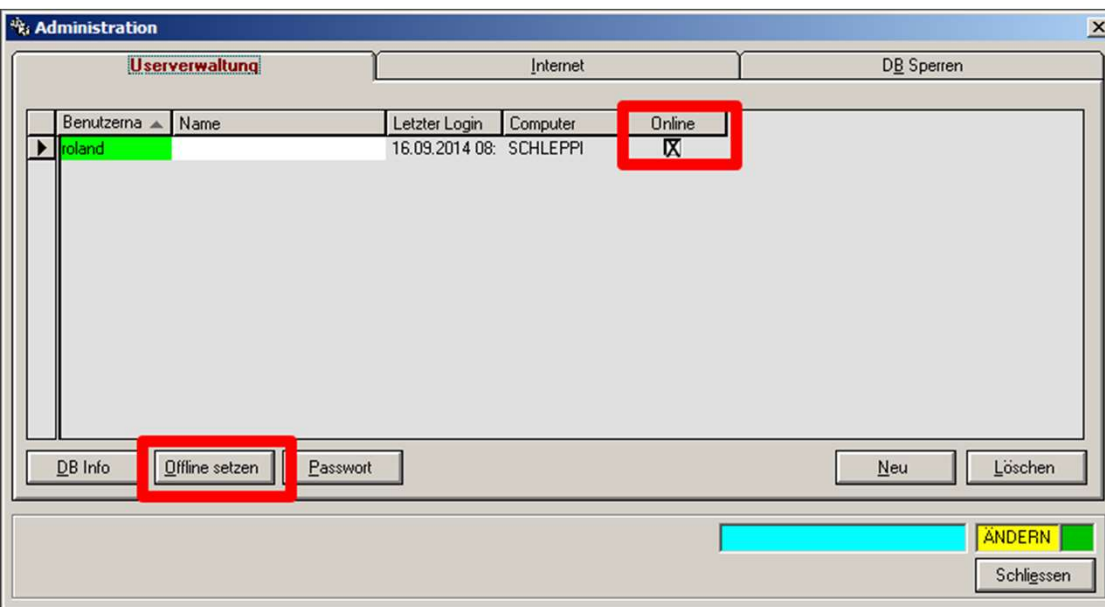
- Set Offline:
  - Release license if it is still locked (e.g. after a crash)

- The user has an active status in the "Online" column.

- To set offline:
  - Select user
  - then click on "Set Offline".

16.2 Rights control

- Rights control in the project
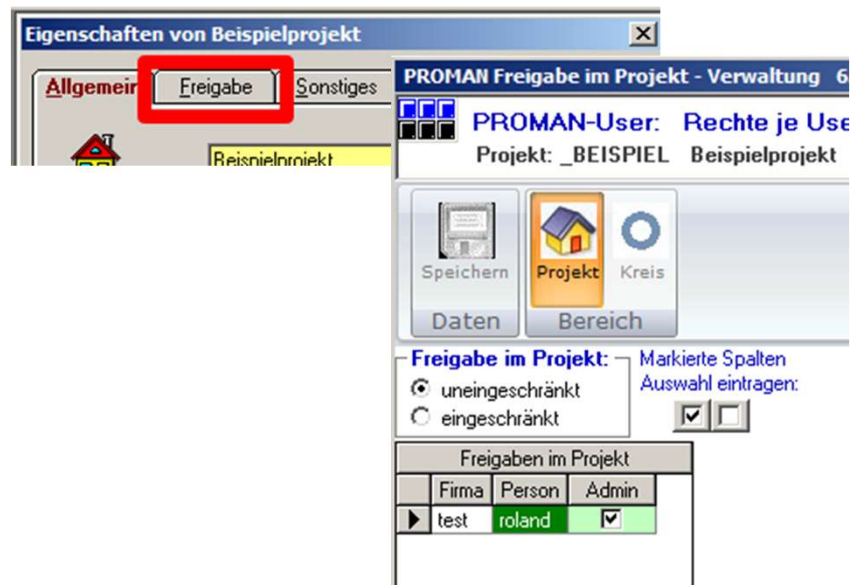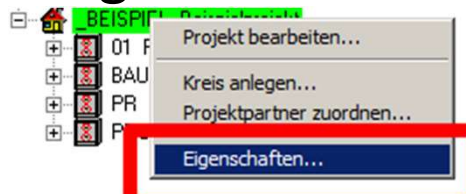
- General rights management
  - In PM_ADMIN1.exe!!

16.3 Rights control: General

- Regulates the general rights of users in the program
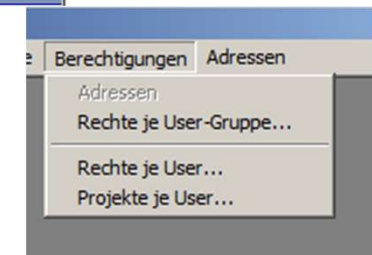
- Rights control for
  - administrator
  - Create projects
  - Delete Projects
  - Edit Layout
  - Assign layout
  - Central address management

16.3 Rights control: General

- Setting for project visibility

16.4 Rights control: in the project

- Rights can be
  - restricted
  - unrestricted

- Rights restricted per project and/or at report collection level

- rights
  - Admin
  - lock
  - read
  - change
  - input

17. mobile operation

- in stationary operation, projects can be transferred into mobile mode or back at any time

- projects can be opened in mobile mode and also edited

17. mobile operation

- Start laptop mode
  - →Select a project that you want to transfer to mobile operation.
  - →You can also transfer several projects at the same time.

17. mobile operation

- Select data with the appropriate rights
  - Editable
    - I.e. the data can be edited in laptop mode.
  - Read only
    - This means that the data cannot be edited in laptop mode. The address book is also not editable in this case.
- **Attention:** You can not create a project in mobile!

18. Import / Export

- Allows data to be exported or imported into report collections
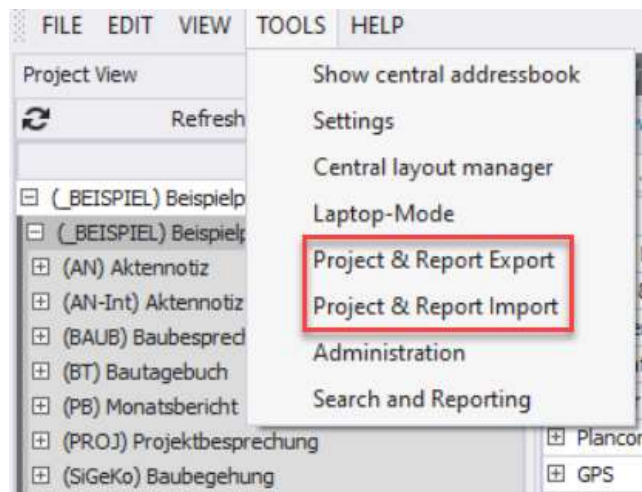
Export can be used for

- Creation of reports from several persons

- Data exchange with partners for further evaluations

- Transmission to AG with restricted reading rights and without comments

18.1 Export

- Select the desired report collection (see 1)

- The report collection can be exported with read-only rights, if required (see 2)

18.1 Export

- Define the advanced export settings (see 1)
  - employees
  - attributes
  - attachments
  - comments
  - Free texts
- The export path can be defined individually (see 2)

18.1 Import

- When importing the report collections, you can define how you want to import them:
  - Import as new project
  - Import into existing project

18.1 Import

- The following can be defined in the target project
  - Import with new folders into project
  - Import as new collection
  - Replace project properties
  - Merge folders with same short name
  - Overwrite existing collections with same short
  - Replace similar addresses

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