



PROMAN

Meeting Report Module

version 4.0

Basic training 2021

1



training program

1. menu control and masks
 - 1.1 Menu control and masks
2. Create project
 - 2.1 Project general data in printout
 - 2.2 Project Logo
 - 2.3 Project template
3. Addresses in the printout
 - 3.1 Central address management
 - 3.2 Address management: Company data
 - 3.3 Address management:
 - Employees per company
 - 3.4 Address management: Advantages of the
 - Name of the company with short name
 - 3.5 Company/employee functions
 - 3.6 Company/employee attributes
 - 3.7 Copying employees
 - 3.8 User defined filter
 - 3.9 Excel Export/Import
4. Address management in the project
 - 4.1 Project partners from central
 - Load address management into project
 - 4.2 Project involved Sorting
 - 4.3 Replacing employees
 - 4.4 Decommissioning inactive datasets
- 5 Report collections
 - 5.1 report collections
 - Copying Print Settings

2

training program



- 6. Attributes
 - 6.1 Creating Attributes
- 7. Chapter structure
- 8. Create report
 - 8.1 Report General Data Printout
 - 8.2 Report: Text blocks
 - 8.3 Report: Next meeting
 - 8.4 Protocol view
 - 8.5 Protocol view:
 - Subscriber Distributor
 - 8.6 Protocol view:
 - Create and Edit report items
 - 8.7 Protocol View: report item Status
 - 8.8 Protocol View: Images and Attachments
 - 8.9 Protocol View: Video Short Training
- 9.1 Changing the report item number
- 9.16 Chapter
- 9.2 Comments in the protocol & Meeting Preparation
- 9.3 report item: Load & Delete
- 9.4 report item: attributes
- 9.5 Examples point status
- 9.6 Import points from another report collection or project
- 9.7 report item: Text and stakeholders Example
- 9.8 Invitation & Agenda Function

3

training program



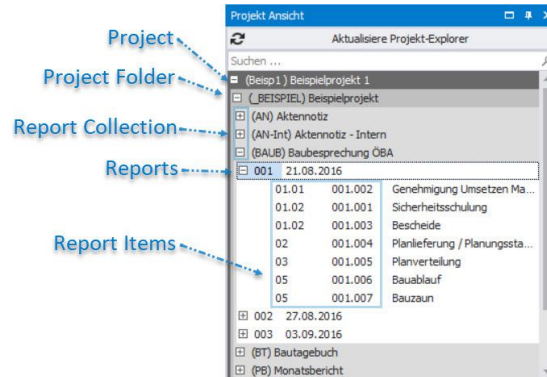
- 10. output types
 - 10.1 E-mail: dispatch
 - 10.2 Sending an e-mail: text blocks
- 12. Evaluation
- 13. Project cockpit
- 14. Printout of station list
 - 14.1 Report Collection: Print Settings 1
 - 14.2 Report Collection: Print Settings 2
 - 14.3 Report Collection: Print Settings 3
 - 14.4 Example printout sorting
 - by report item number and chapter
 - 14.5 Report collection:
 - Print Settings 4
 - 14.6 Examples Printout Representation of the report item no.
 - 14.7 Examples printout nomination
 - of the person involved on report items
 - 14.8 Report Collection: Print Settings 5
 - 14.9 Printing examples: New meeting contents
 - bold and dates according to the
 - Due date highlighted in color
- 15. Print layout
 - 15.1 Print Layout: Meeting core data
 - 15.2 Print layout: Participants / distribution list
 - 15.3 Print Layout: Participants
 - Partially Present
 - 15.4 Print Layout: Chapter
 - 15.5 Print Layout: Report Item Table
- 16. User administration and rights control
 - 16.1 User Administration
 - 16.2 Rights control
 - 16.3 Rights control: General
 - 16.4 Rights control: in the project
- 17. Mobile operation
- 18. Import / export
 - 18.1 Export

4

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



6

1. Menu control and masks

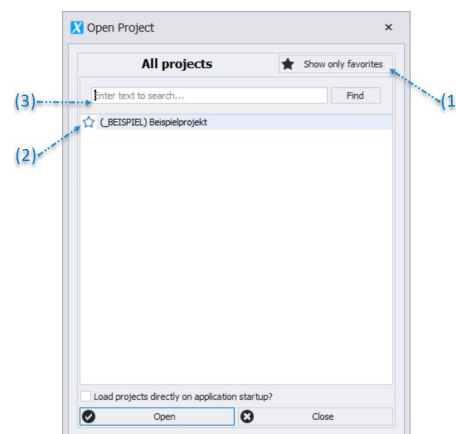


When PROMAN X is started the "Open project" dialog opens.

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)



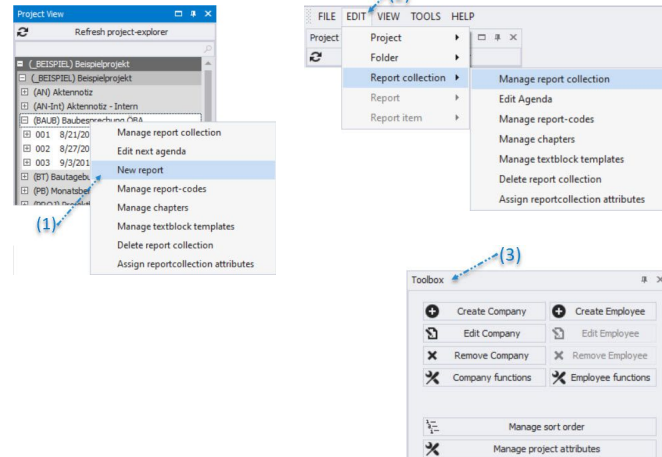
7

1.1 menu control and masks



Control the application using:

- Right mouse click (1)
- Upper menu items (2)
- Toolbox (3)

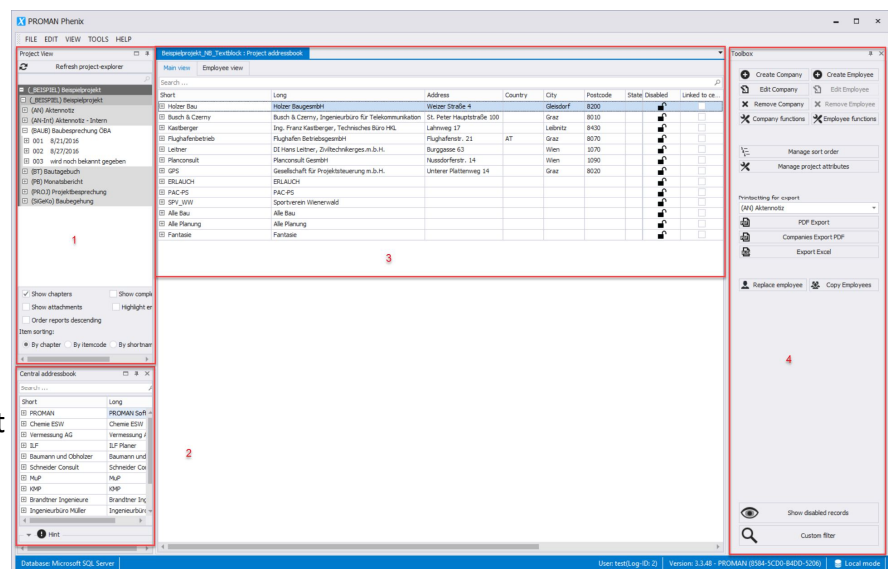


8

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

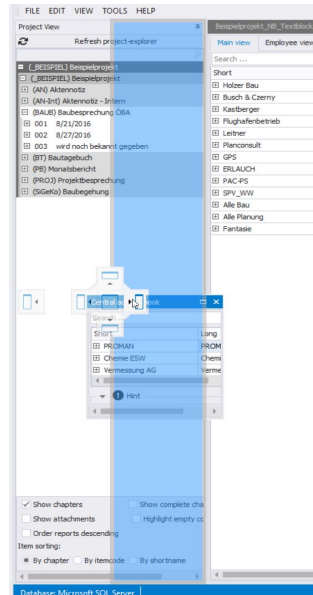


9

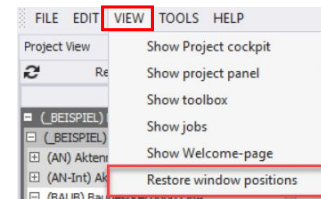
1.1 menu control and masks



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.



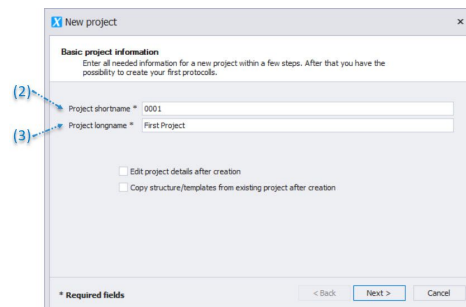
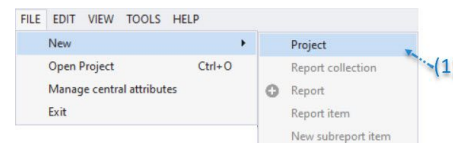
10

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.*



11

2. Create project

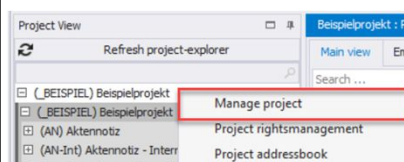


When creating a project you can make the following selections:

- 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)

12

2.1 project general data in printout



Beispielprojekt

BESPRECHUNGSBERICHT
Baubesprechung ÖBA No.: 003

Date of issue: 9/6/2016
Date of Meeting: 9/3/2016
Time: from: 9:00 AM to: 11:00 AM
Place: GPS-Container
Subject: Bauablauf

Project-no.: _BEISPIEL
Doc.-no.: 1010///BAUB/003
Chairman: Waldherr
Writer: Kastberger

13

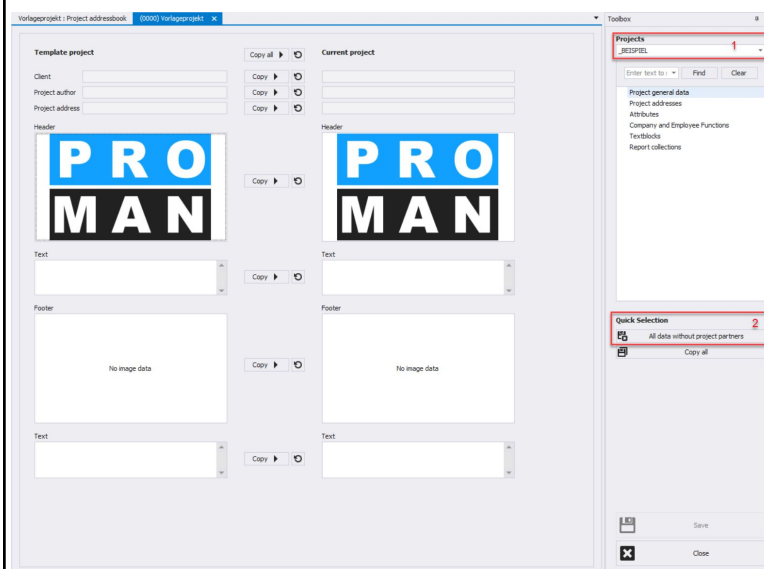
2.2 project logo

- 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



14

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.

15

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	•	•
Keppeler	BH	Flughafen BetriebsgebmH	•	•
Ecker	BK	DI Hans Leitner, Ziviltechnikerges.m.b.H.	•	•
Aichberg	BM	Holzer BaugesmbH	•	•
Frank	BH	Flughafen BetriebsgebmH	•	•
Müller	PS	Gesellschaft für Projektsteuerung m.b.H.	•	•
Schnatter	PS	Gesellschaft für Projektsteuerung m.b.H.	•	•
Höchtl	BH	Flughafen BetriebsgebmH	•	•
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
001 / 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 Rauscher

Attributes: Änderungen:

16

3.1 central address management

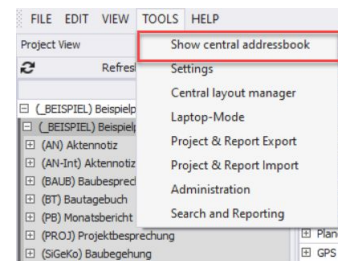


Under **Tools** -> **show central addressbook**, you can access the central address management.

- 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



17

3.1 central address management

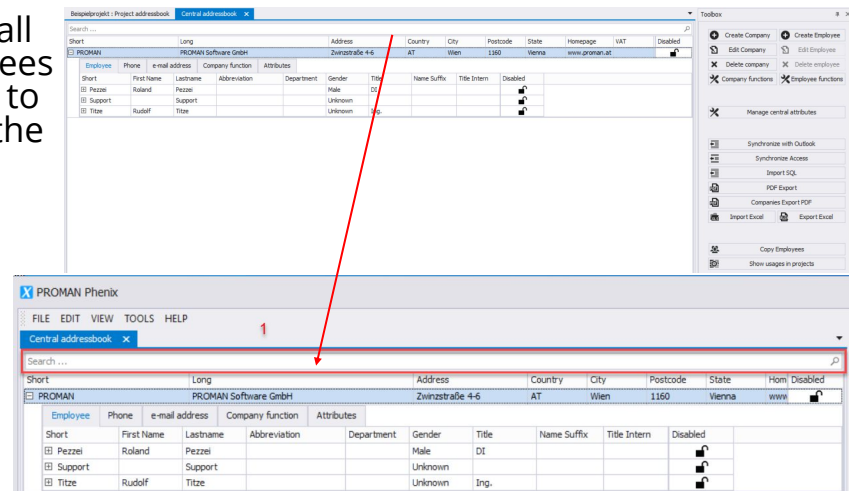


In the central address book, you can manage all companies and employees in order to assign them to the desired projects in the next step.

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)*



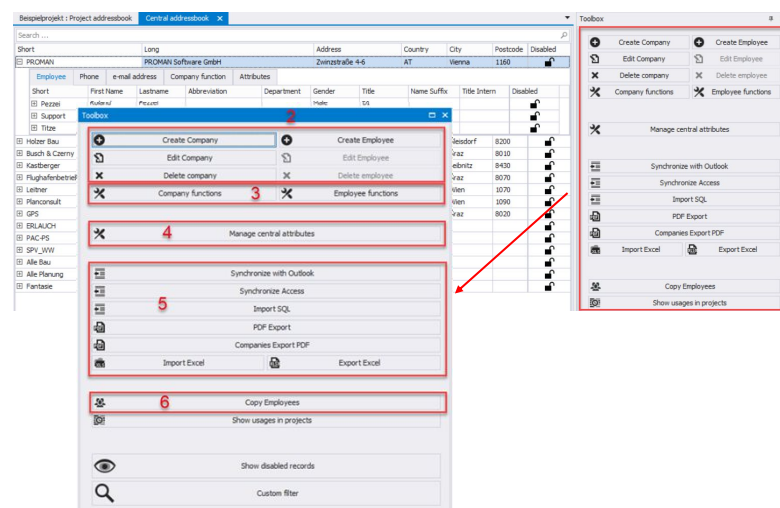
18

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)*



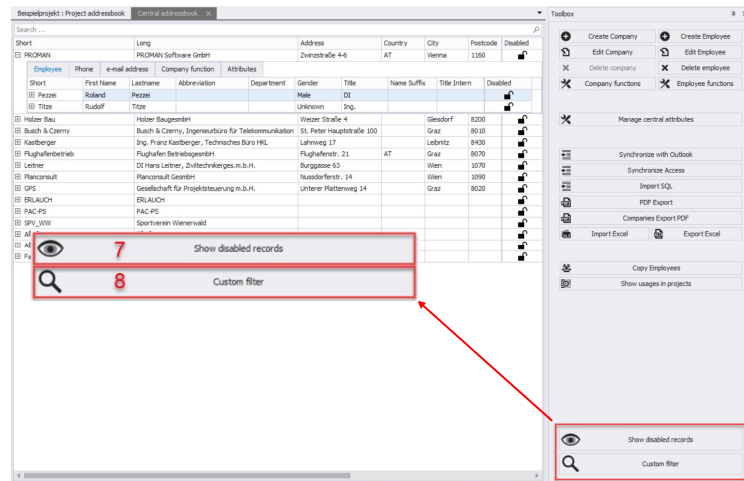
19

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.



20

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)

21

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)

22

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.

23

3.3 address management: employees 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.

24

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)

25

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.*

26

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

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Attribute: Änderungen:		

27

3.5 Company/employee functions

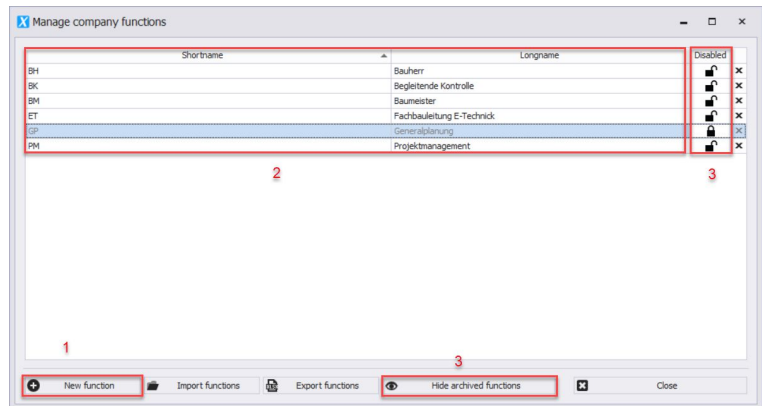


Functions are often used for the representation of the functions/works of the Companies and employees.

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)

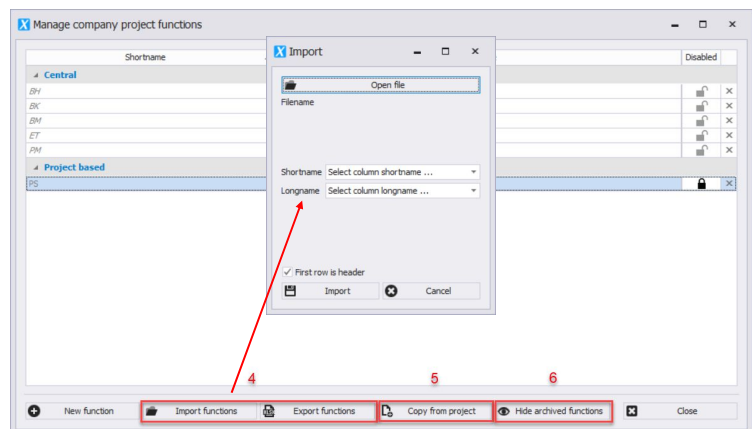


28

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)



29

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)

30

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)

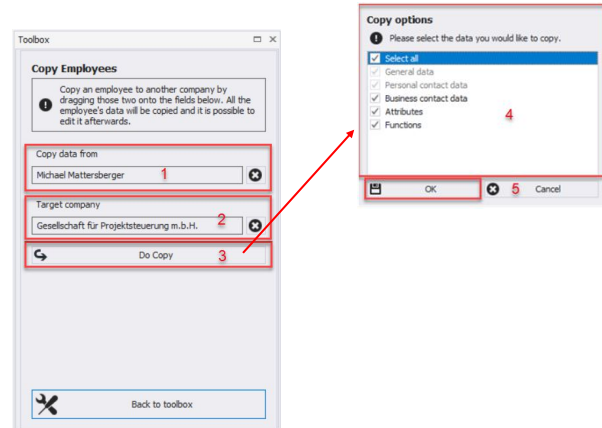
31

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)



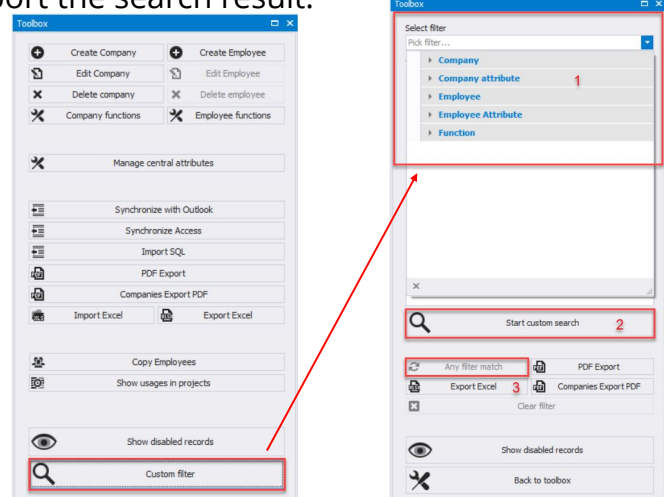
32

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.

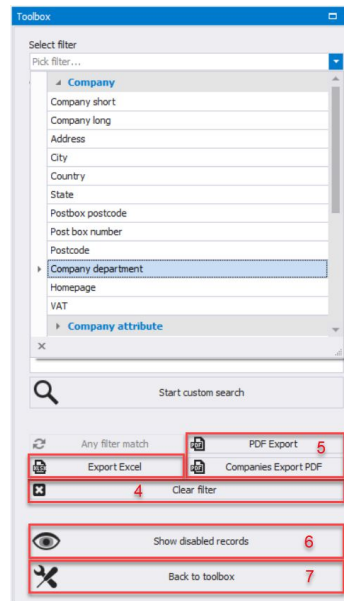
- Select your search criteria, e.g. postcode, attribute, department, etc.. (see 1)
- Click on "Start custom search" to activate the search process. (see 2)
- If several search criteria have been selected within a category (e.g. company), you can determine whether all criteria must be fulfilled or one must apply - "Any filter applicable". (see 3)



33

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)



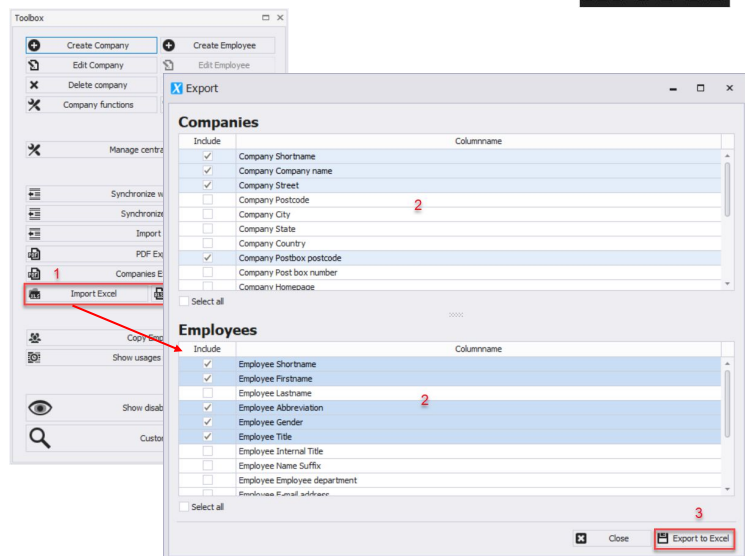
34

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)

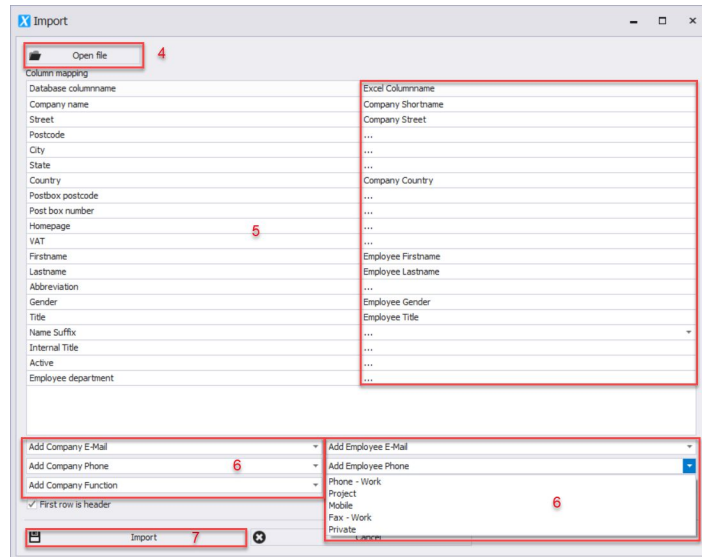


35

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)



36

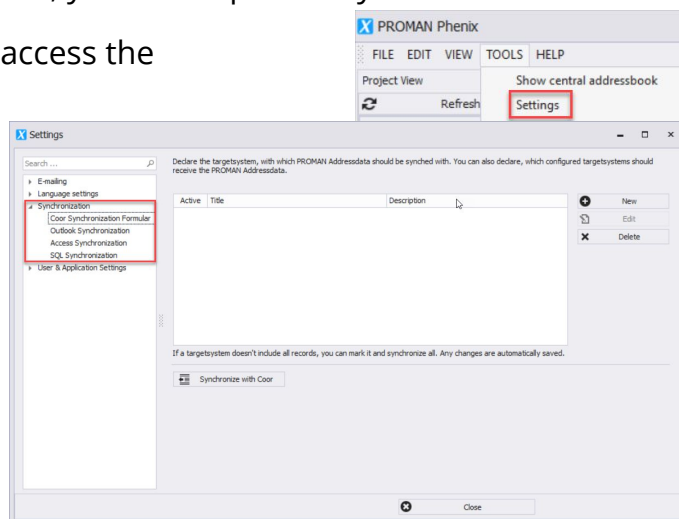
3.10 Import / sync with other programs



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.



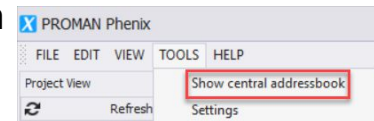
37

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.



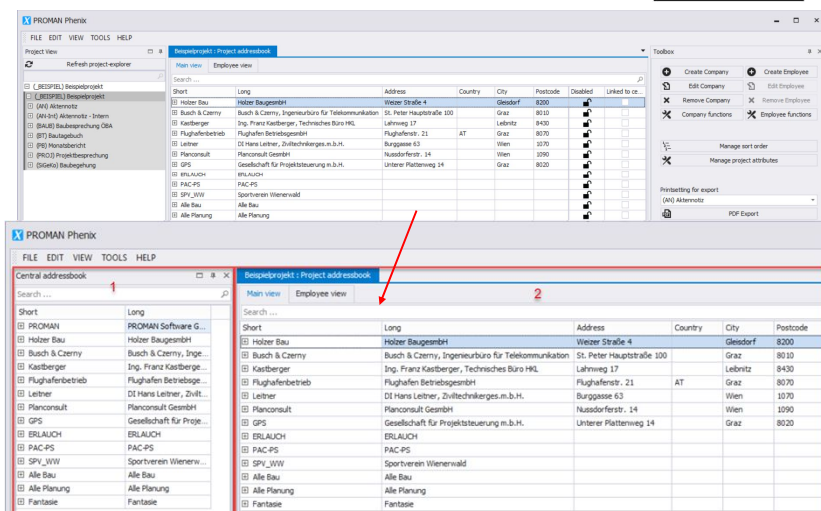
38

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)

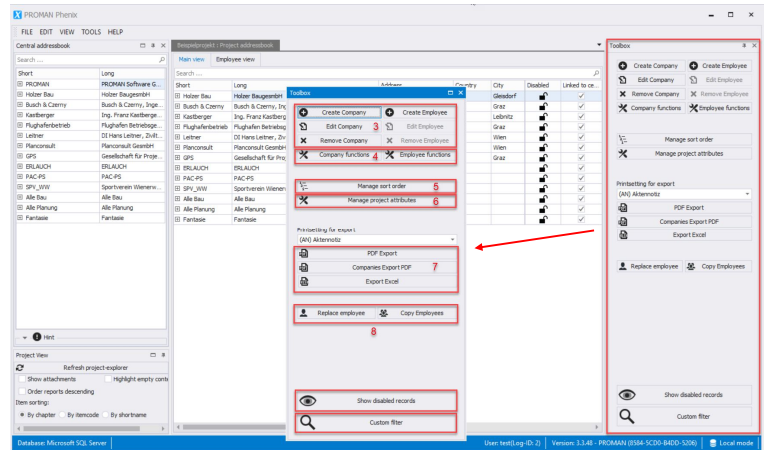


39

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)

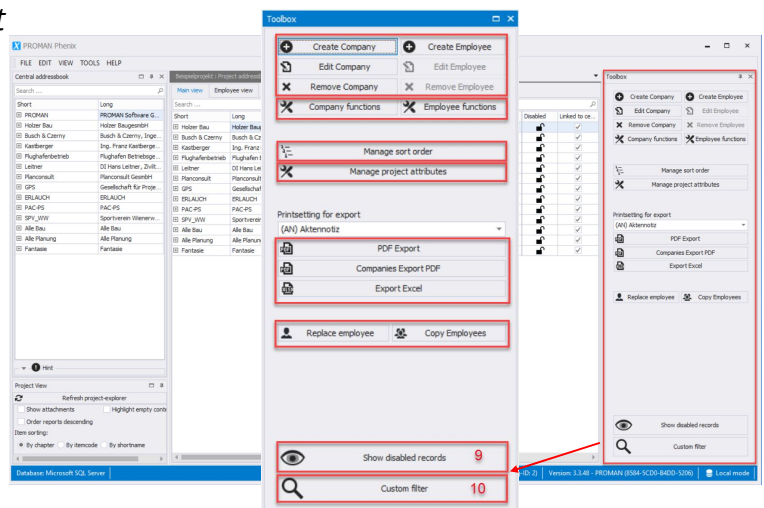


40

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)

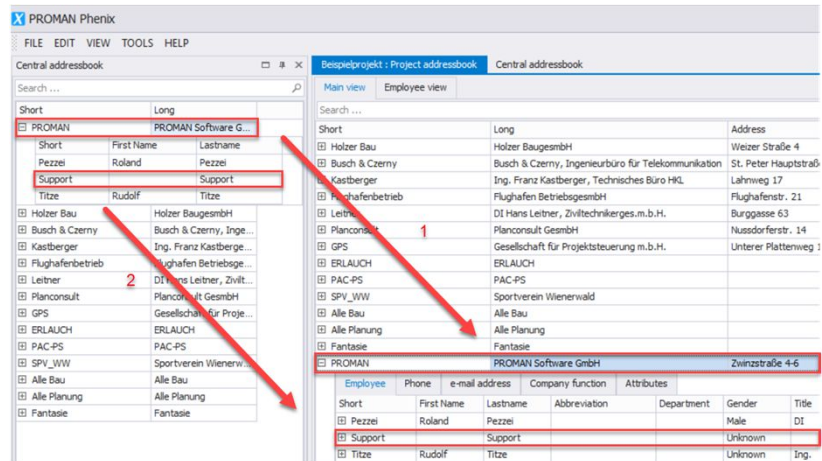


41

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

Transfer of centrally created companies and addresses into your project

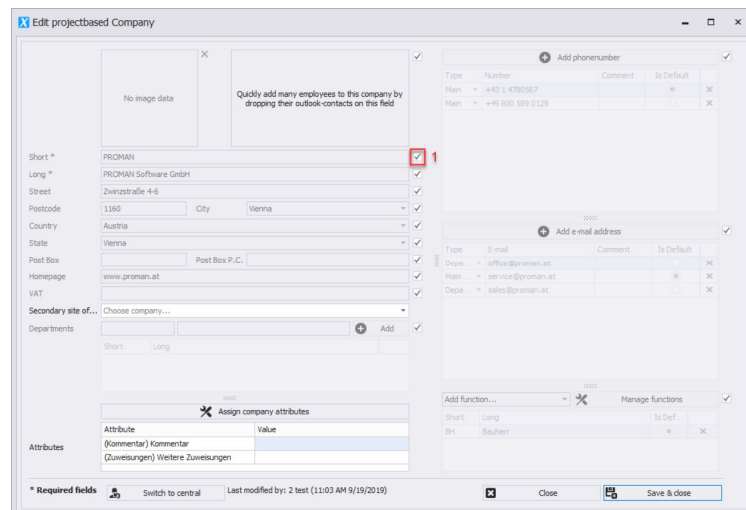
- In the opened mask you can select your project partners from the central address management and import them into the project using drag&drop.
 - Company (see 1)
 - Person/Employee (see 2)



42

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.



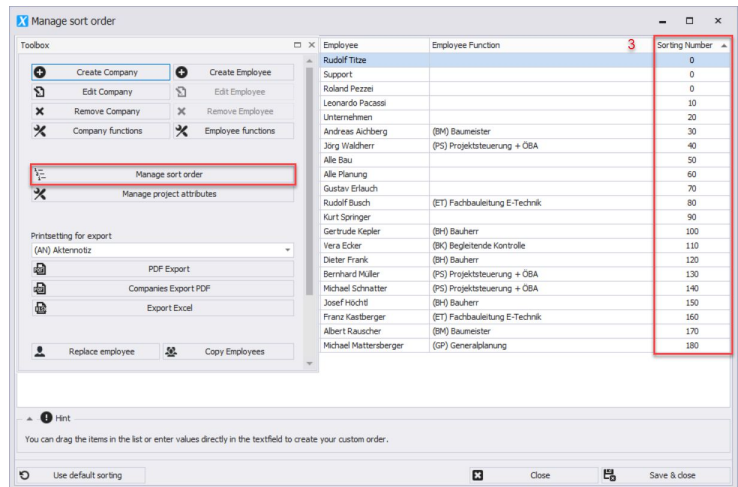
43

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.

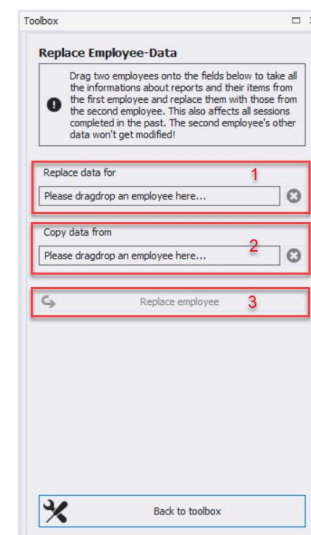


44

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).

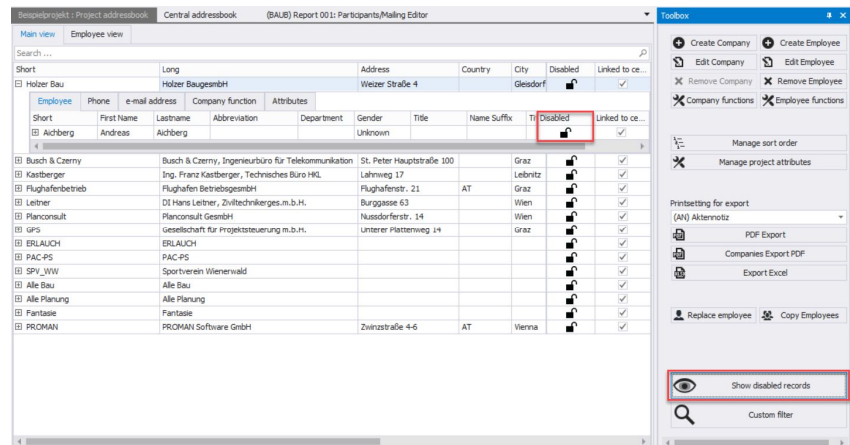


45

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.



46

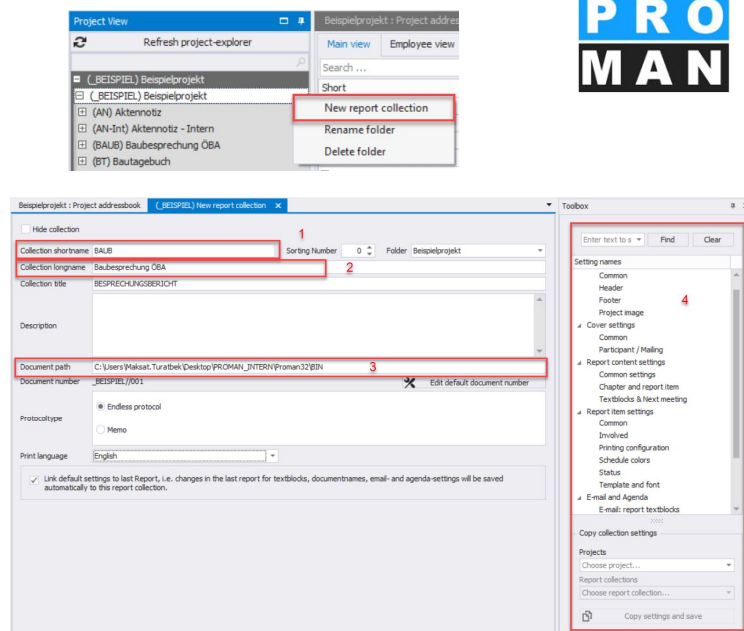
5 report collection

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).



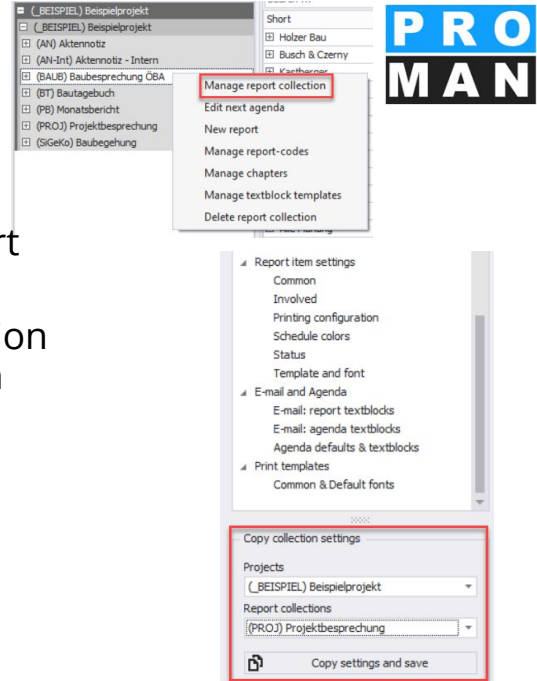
47

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.



48

5.1 report Collection print settings





Beispielprojekt

BESPRECHUNGSBERICHT
Baubesprechung ÖBA No.: 003

Date of Issue: 9/6/2016
 Date of Meeting: 9/9/2016
 Time: from: 9:00 AM to: 11:00 AM
 Place: GPS-Container
 Subject: Baublauf

Project-no.: _BEISPIEL
 Doc-no.: 1010///BAUB/003
 Chairman: Waldherr
 Writer: Kastberger

BESPRECHUNGSBERICHT No.: 003 on 9/3/2016
 Project: Beispielprojekt Project-No.: _BEISPIEL

Item	Subject	cr	Responsible	Deadline
SIC	Sicherheit			
BAUB.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.			

☐ Hide collection

Collection shortname: BAUB Sorting Number: 0

Collection longname: Baubesprechung ÖBA

Collection title: BESPRECHUNGSBERICHT

Description:

49

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

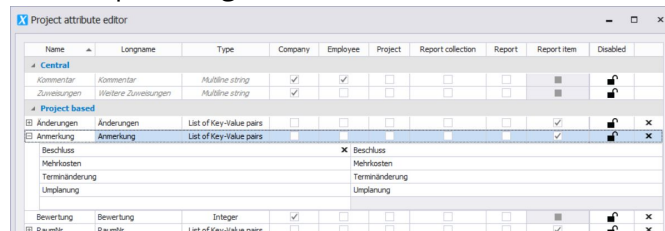
BAUB 002.005
002 / 8/27/2016

Bauzeitplan

Die Baufirma legt den Bauzeitplan in der Baubesprechung vor. Zuvor wird er an der ÖBA abgestimmt.

003 / 9/3/2016

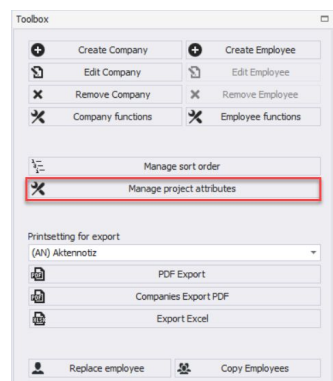
Vorabzug des Bauzeitplans wurde vor Version wird in einer Woche verteilt.



50

6.1 Creating Attributes

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

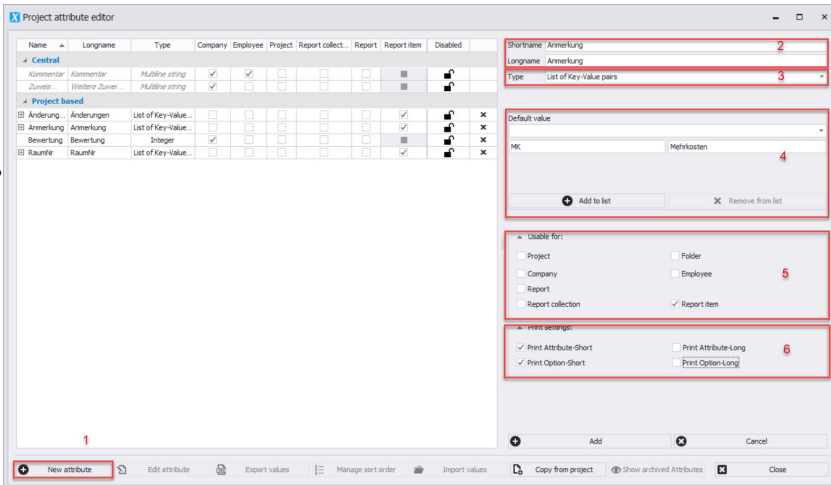


51

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).

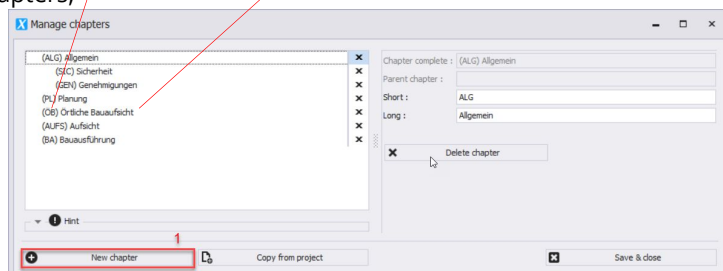
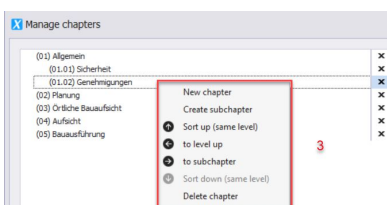
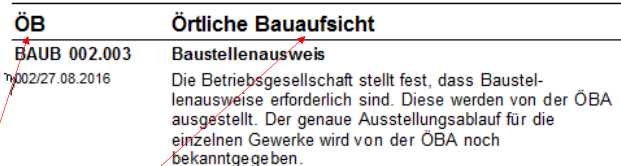
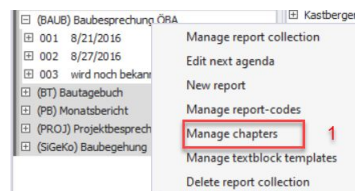


52

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.



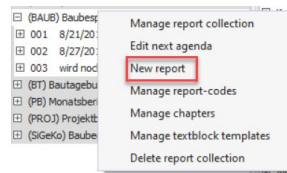
53

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.



54

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.



Beispielprojekt

BESPRECHUNGSBERICHT

Baubesprechung ÖBA No.: 004

Date of Issue: 10/1/2019

Date of Meeting: 9/10/2016

Time: from: 9:00 AM to: 11:00 AM

Place: GPS-Container

Subject: Planung

Project no.: BEISPIEL

Doc-no.: 1010///BAUB/004

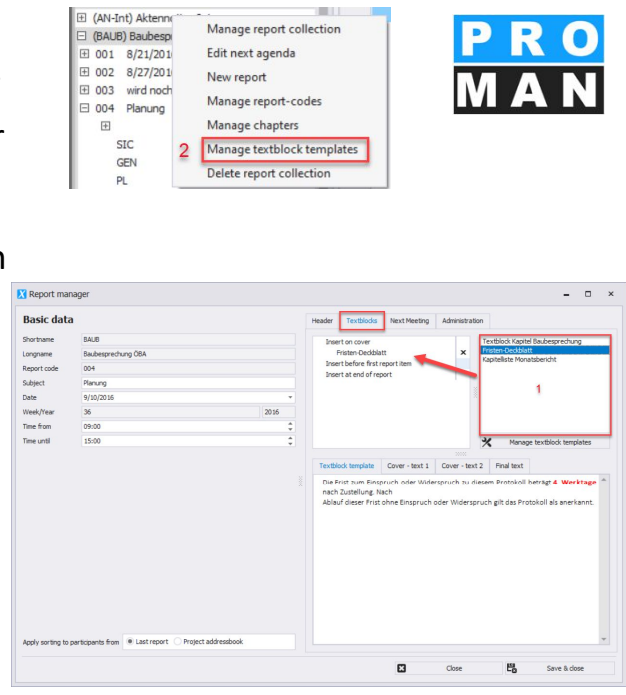
Chairman: Waldherr

55

8.2 Report: Text blocks

In the textblocks tab, you can insert your textblocks at different points in the report. These are automatically transferred 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).

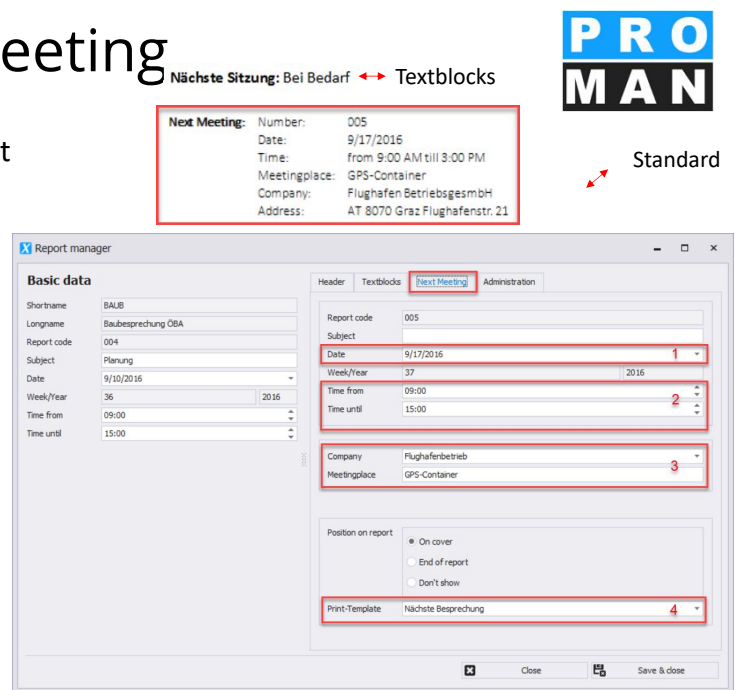


56

8.3 Report: Next meeting

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)
 - *Position 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)



57

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.

Beispielprojekt

BESPRECHUNGSBERICHT Baubesprechung ÖBA No.: 003

Date of Issue: 9/6/2016
Date of Meeting: 9/3/2016
Time: from 9:00 AM to 11:00 AM
Place: GPS-Container

Project-no.: BEISPIEL
Doc-no.: 1010//BAUB//003
Chairman: Waldherr

Participants / Distributors:

Name (w/o Title)	Function	Company	Phone mobil	present	Distr.	temporary
Waldherr	PS	GPS	+43 6769182356	●	●	○
Busch	ET	Busch & Czerny	+43 316654345	●	●	○
Keppler	BH	Flughafenbetrieb	+43 6649898567	●	●	○
Ecker	BK	Leitner	+43 69910203345	●	●	○
Aichberg	BM	Holzer Bau	+43 31124444241	●	●	○

58

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.

59

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.

Beispielprojekt

BESPRECHUNGSBERICHT
Baubesprechung OBA No. 003

Date of Issue: 9/5/2016
Date of Meeting: 9/5/2016
Time: from: 9:00 AM to: 11:00 AM
Place: GPS-Container
Subject: No subject defined

Project-no.: BEISPIEL ✓
Doc.-no.: 10100/BAUB/003 ✓
Chairman: Waldher ✓
Writer: No leader selected X
Symbol: No author sign selected X
Meeting-no: Nothing selected

Name (with Title)	Function	Company	Phone mobile	present	Distr.	Temporary
Waldher	PS	GPS	+43 6769132356	●	●	○
Buch	ET	Buch & Coerni	+43 336854345	●	●	○
Wagner	BM	Flugfeldbetriebs	+43 6648888887	●	●	○
Eder	BM	Lehrer	+43 69910202145	●	●	○
Alchberg	BM	Hotel Bau	+43 31244444242	○	○	○
Frank	BM	Flugfeldbetriebs	+43 6648888886	○	○	○
Müller	PS	GPS	+43 3169222224	○	○	○
Schneider	PS	GPS	+43 6769132374	○	○	○
Hochr	BM	Flugfeldbetriebs	+43 3168789115	○	○	○
Waldherger	ET	Waldherger	+43 346236214	○	○	○
Baucher	BM	Hotel Bau	+43 31244444312	○	○	○
Waldherger	GP	Planconsul	+43 6644223322	○	○	○

Die Protokoll 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 to 3:00 PM
Meetingplace: GPS-Container
Company: Flugfeldbetriebs GmbH
Address: AT 8070 Gries Flugfeldstr. 11

60

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).

Baubesprechung OBA

- 001 8/21/2016
- 002 8/27/2016
- 003 9/3/2016

Right-click menu options:

- Open report protocol
- Manage report
- New report item
- Manage participants** (2)
- Edit Agenda
- Manage report item numbers
- Prepare for meeting
- Print report (Print-Preview)
- Print report as pdf
- Print report as rtf
- Print report as xlsx
- Delete report
- Send e-mail

Toolbox actions:

- Create new report item
- Create new report item and open detail
- Import report items
- Load report items
- Send e-mail
- Print report (Print-Preview)
- Print report as pdf
- Print report as rtf
- Print report as xlsx
- Prepare for meeting
- Open agenda for this report
- Open agenda for following report
- Manage report
- Manage chapters
- Manage participants** (1)
- Manage textblock templates

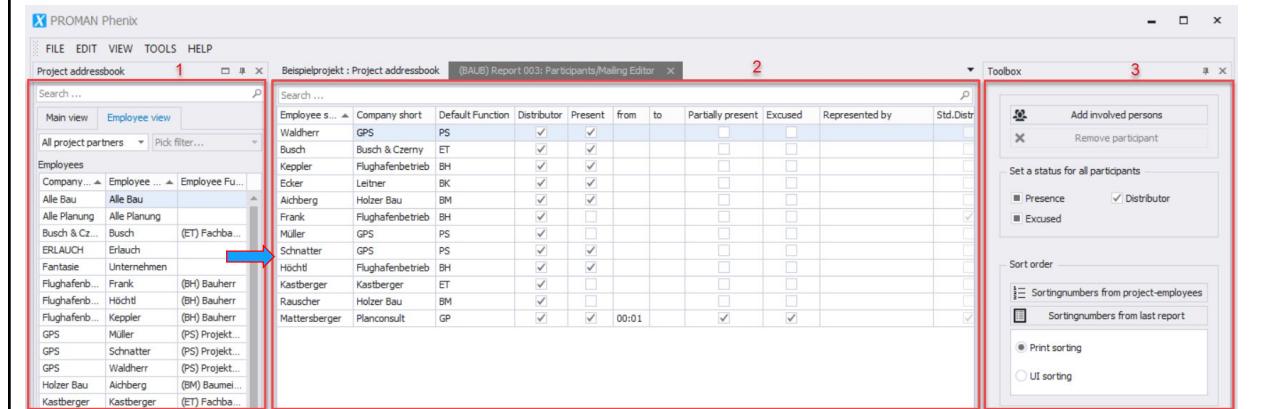
61

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).

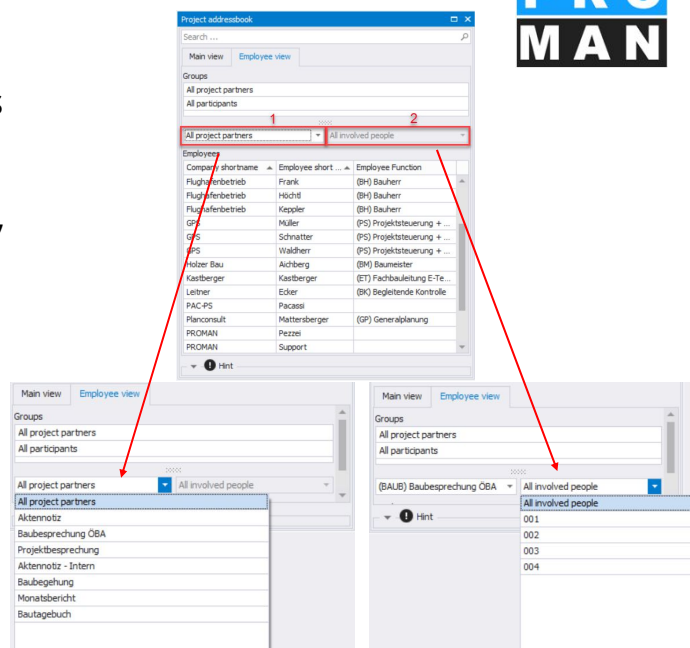


62

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.



63

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

SIC	Sicherheit		
001.002	Genehmigung Umsetzen Masten	All project partners	open
001 / 21.08.2016	Im Baufeld befinden sich zwei Masten. Die Genehmigung für das Umsetzen der Masten durch die OZB erfolgt frühestens ab 22.9.2016.		Date...
	Ergebnis: No text set...		
	Comment: No commentary for this item...		
003 / 03.09.2016	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 Rauscher	23.09.2019 09.10.2016
	Ergebnis: No text set...		
	Comment: No commentary for this item...		
	Attributes: No attributes assigned		

66

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

GEN	Genehmigungen		
001.003	Bescheide	Frank	open
002 / 27.08.2016	Bescheid Errichtungsbewilligung wurde am 27.8.2016 von Herrn Frank verteilt.		22.08.2016
	<ul style="list-style-type: none"> • Noch ausständige Bescheide: • Wasserrecht • Betriebseinschränkung • Versetzen Mast • Gepäckförderanlage 		
	Ergebnis: No text set...		
003 / 03.09.2016	Bescheid für die Betriebseinschränkung wurde von der Betriebsgesellschaft am 29.8.2016 an die OBA übergeben.	Frank GPS	22.08.2016

67

8.6 Protocol View: Create and Edit report item

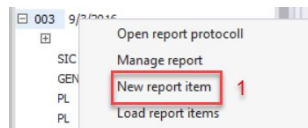


- Points can be easily hidden by clicking the printer icon (1)
- individual entries from the history can also be hidden (2)



68

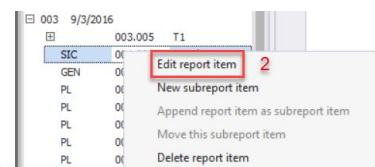
8.6.1 Report item Create & Edit



BAUB 002.002 Bautafel

002/27.08.2016	Ein Vorabzug des Bautafel-Layouts wird an Baufirma und ÖBA übermittelt.
003/03.09.2016	GP übergibt das Layout in der nächsten Baubesprechung. Das Rendering musste neu erstellt werden.

Mattersberger	03.09.2016
Mattersberger	03.09.2016



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).

69

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)

70

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)

71

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!



Report item settings

- Common
- Involved**
- Printing configuration
- Schedule colors
- Status
- Template and font

Print view of involved persons in report items

Same as in report item

Form for print

Shortname

Person

Company

Function

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			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			x
Holzer Bau	Rauscher	BM		10/9/2016			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			x

72

8.6.1 Advanced report item settings

Beispielprojekt : Project addressbook (BAU) Report 003: Report item editor

Code: 001.006

Shortname: Bauablauf

Chapter: (BA) Bauabführung

Status: offen_Standard

Status text: open

Additional item information

Images before content

Images after content

Attachment

Attribute name: (Anmerkung) A...

Attribute value: (Merkmalen) M...

Report item history

001/8/21/2016

Der von der Baufirma vorgeschlagene Bauablauf für die kommenden zwei Wochen umfasst folgende Tätigkeiten:

- Erstellen des Bauplans
- Aufstellen des Baubaus
- Einrichten der Containersiedlung
- Ausstellen des Krans
- Beschilderung
- Einholen und Überprüfen des Bombenkatasters

002/8/27/2016

In KVV SS

- Aufstellen des fixen und des prov.

Edit report item history

Content

Comment

Free text

For the erection of the building site in the foreground, it is necessary to carry out the work of the building company.

Company

Shortname

Default Function

Main responsible

Completed to be

Completed is

Post app...

Print company

Print employee

Print function

Begin target

Begin actual

Reminder

Report item history - BAU-003-006

Report item

Report date

Report status

Completion date

001/8/21/2016

Der von der Baufirma vorgeschlagene Bauablauf für die kommenden zwei Wochen umfasst folgende Tätigkeiten:

- Erstellen des Bauplans
- Aufstellen des Baubaus
- Einrichten der Containersiedlung
- Ausstellen des Krans
- Beschilderung
- Einholen und Überprüfen des Bombenkatasters

002/8/27/2016

In KVV SS

- Aufstellen des fixen und des prov.

Check for all items to be printed

Save & close

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.

Common settings

Start printing items on cover (no new page)

Print report items with content or deviant involved persons only

If permanent info, print last item only

Print settings

Print items

Only the last

5

contents

only if report item contains content

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

Copy collection settings

Projects

Choose project...

73

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) ...

Project	Status	Description
open	open	Will not be taken to the next report.
Beschluss	permanent info	Will be taken to the next report.
DauerInfo_Standard	completed	Will be taken to the next report.
inbearbeitung_Standard	in progress	Will be taken to the next report.
Info_Standard	one time info	Will not be taken to the next report.
offen_Standard	open	Will be taken to the next report.
storniert_Standard	canceled	Will not be taken to the next report.
Wiedervorlage_Standard	resubmission	Will be added at the defined date to a report in the future.
zurückgestellt_Standard	deferred until	Will be added at the defined date to a report in the future.

74

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.

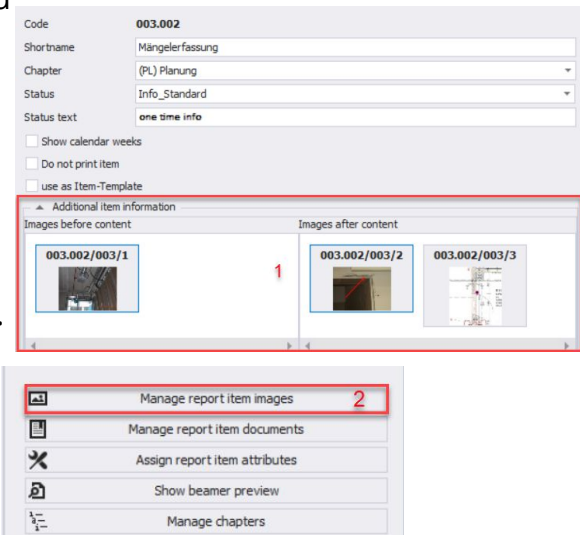
Project	Status	Description
open	open	Will not be taken to the next report.
Beschluss	permanent info	Will be taken to the next report.
DauerInfo_Standard	completed	Will be taken to the next report.
inbearbeitung_Standard	in progress	Will be taken to the next report.
Info_Standard	one time info	Will not be taken to the next report.
offen_Standard	open	Will be taken to the next report.
storniert_Standard	canceled	Will not be taken to the next report.
Wiedervorlage_Standard	resubmission	Will be added at the defined date to a report in the future.
zurückgestellt_Standard	deferred until	Will be added at the defined date to a report in the future.

75

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.



76

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)



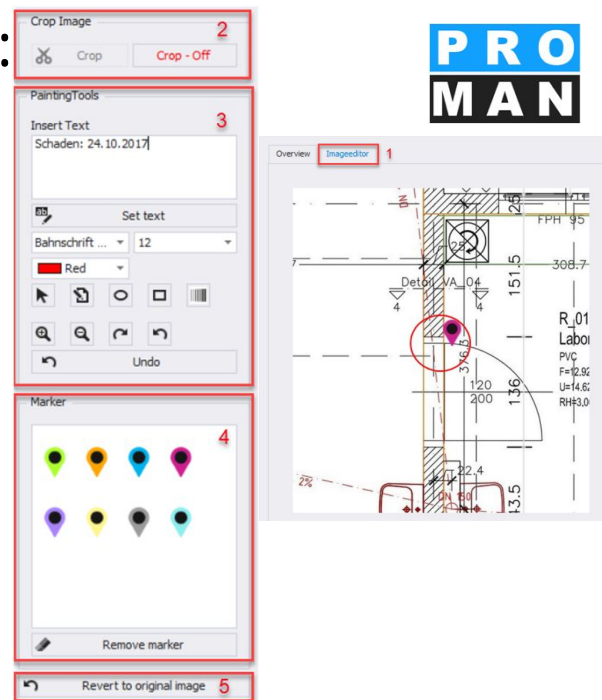
77

8.8.1 Advanced Settings: pictures

- In the tab „Imageeditor“ (see 1) you can quickly and easily adapt your photos and plans:

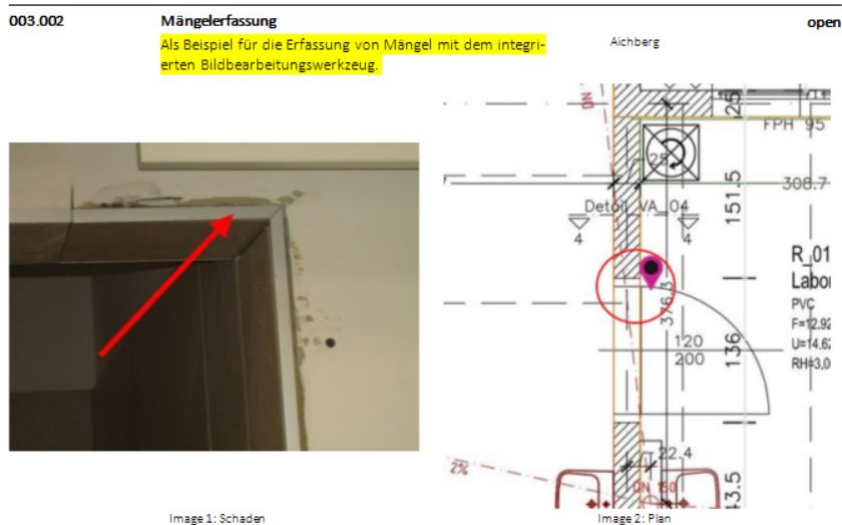
- Cutting (see 2)
- Insert text and shapes (see 3)
- Set markers with drag&drop (see 4)
- Undo all changes (see 5)

With this feature, you can directly highlight relevant image sections, plans, positions, defects, before-and-after statistics much more visually.



78

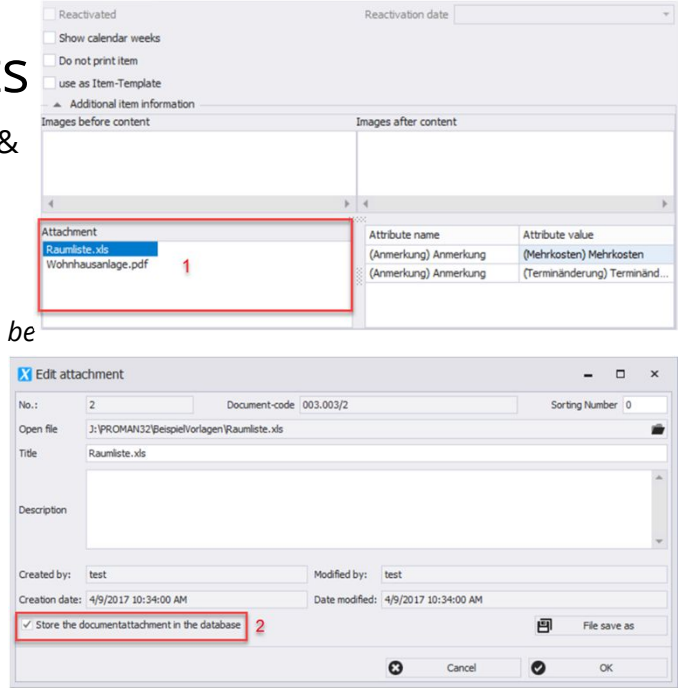
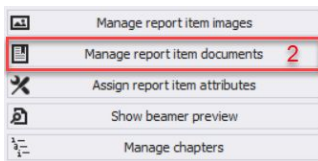
8.8.1 Advanced Settings: pictures



79

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!



80

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

PROMAN

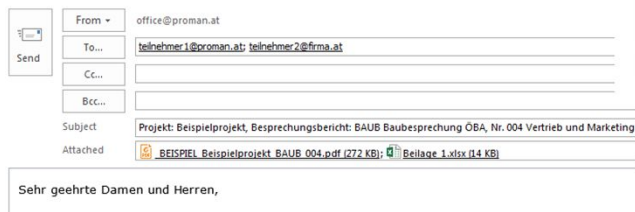
BAUB 003.003

NEU: Beilagen zu Punkten

Bei jedem Punkt können Dokumente oder beliebige Dateien als Beilagen gespeichert werden. Beim Versenden der eMail aus dem Programm oder beim PROMAN-EXPORT werden diese Dateien mit verschickt. Unter dem Schalter Beilagen erhalten Sie eine Maske zum Erfassen von Dokumenten. Dort sind auch die als Beispiel gespeicherten Dokumente abrufbar (über Anwahl Dokument!)

 Beilagen: 003.003/2 Raumliste.xls
 003.003/3 Wohnhausanlage.pdf

Item 003.003/3



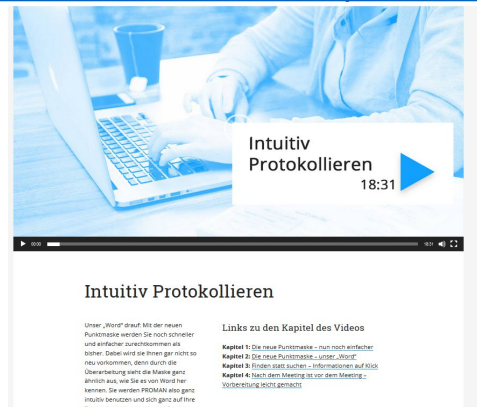
Item 003.003/3									
Nr.	Umsatzname	Clear	Anfang	Ende	1	2	3	4	5
1	VWS-Fassade	15 Tage?	Mo 13.04.09	Fr 01.05.09					
2	VWS-Fassade Normale	10 Tage?	Mo 13.04.09	Fr 01.05.09					
3	Dämmung + Estrich	10 Tage?	Mo 13.04.09	Fr 01.05.09					
4	Stegplatten Verputz, Trennung	10 Tage?	Mo 20.04.09	Fr 01.05.09					
5	Außenanlagen - Einbauden, Schüttung	10 Tage?	Mo 19.04.09	Fr 01.05.09					
6	Einbauden, Schüttung	10 Tage?	Mo 19.04.09	Fr 01.05.09					

81

8.9 Protocol View: Video Short Training **PRO MAN**

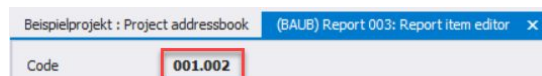
- More information about the new reporting mask can be found in the training video at

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



82

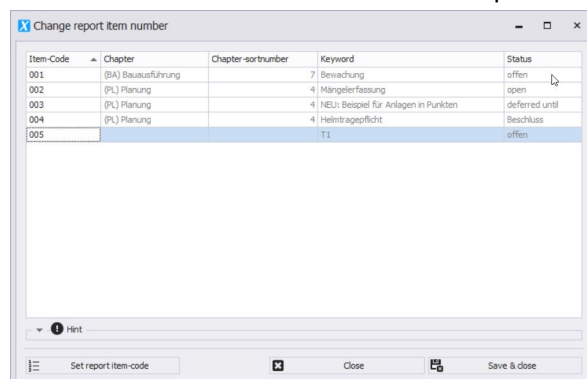
9.1 Changing report item number



- 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



83

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 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 Busch, Busch & Czerny	10.09.2014 03.09.2014
<small>PROMAN 3.1 Lizenz: 1010/BAUB/003 Seite 2 / 4</small>			

84

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

003.001 Bewachung open
003/03.09.2016 Solidatum... 10.02.2016

Falls eine Zugänglichkeit auf die Baustelle durch Baustellenfremde infolge nicht geschlossenen Bauzauns besteht, hat die Baufirma für die Bewachung während der Arbeitszeit zu sorgen.

Ergebnis: Kein Text gesetzt

Kommentar: meine Informationen für die nächste Sitzung zu diesem Punkt: (diese können nur im Ausdruck Protokoll Vorbereitung angezeigt werden)

Attachment

Edit report item history

Content Comment Free text


meine Informationen für die nächste Sitzung zu diesem Punkt: (diese können nur im Ausdruck Protokoll Vorbereitung angezeigt werden)

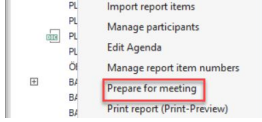
Company	Shortna...	Default Fu...	Main responsible	Completed to be	Complete...	Post a...	Print emp...	Print fu...	B...	Re...	Print company
GPS	Waldherr	PS									
Holzer B...	Rauscher	BM		2/10/2016							

87

9.2 Comments in the report & Meeting Preparation

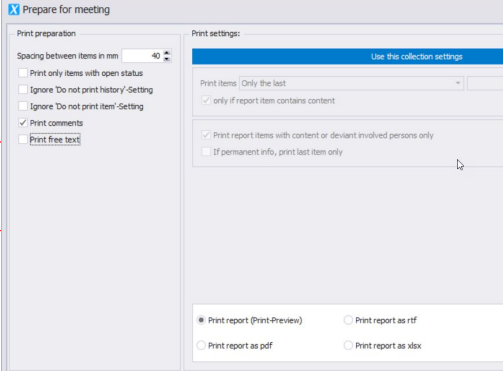
Allows you to create notes for your next report.





Item	Subject	cr	Responsible	Deadline
	<p>bige Dateien als Beilagen gespeichert werden. Beim Versenden der eMail aus dem Programm oder beim PROMAN-EXPORT werden diese Dateien mit verschickt. Unter dem Schalter Beilagen erhalten Sie eine Maske zum Erfassen von Dokumenten. Dort sind auch die als Beispiel gespeicherten Dokumente abrufbar (über Auswahl Dokument)</p> <p>Kommentar: Bei der nächsten Besprechung muss ich folgenden wichtige Punkte klären: 1. 2.</p> <p>Beilagen: 003.003/2 Raumliste.xls 003.003/3 Wohnhausanlage.pdf</p>			

Space for handwritten Notes




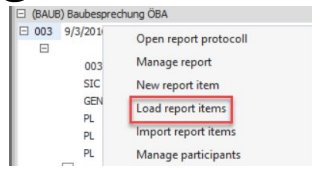
0.2 Genehmigungen

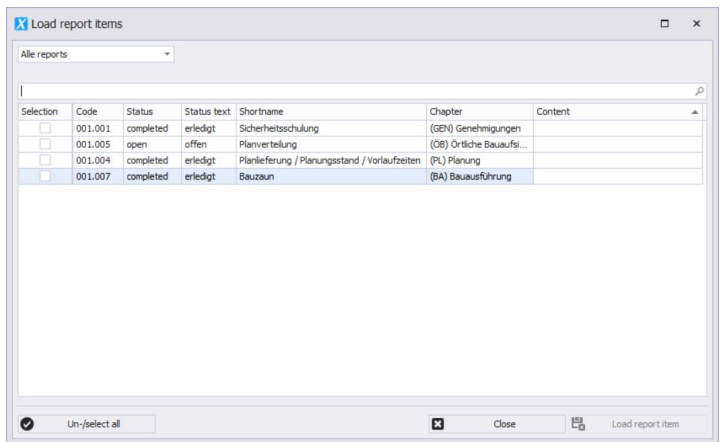
88

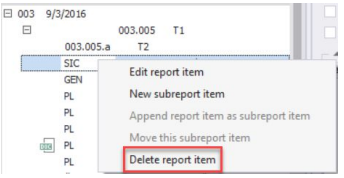
9.3 report item Load&Delete

- With the option „Load report items“ you can included 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.









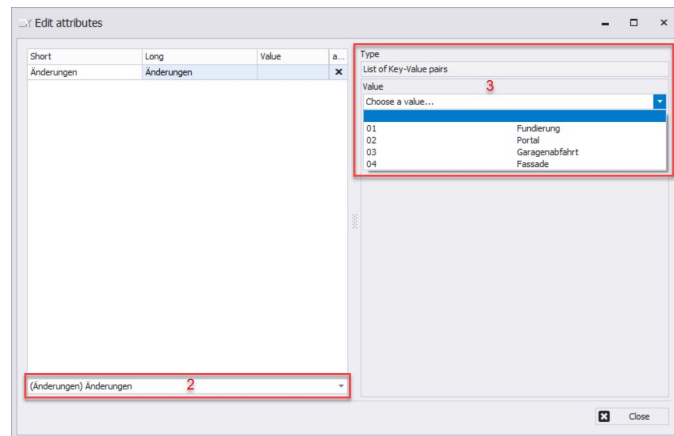
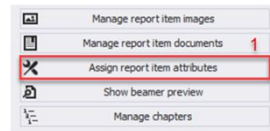
90

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)



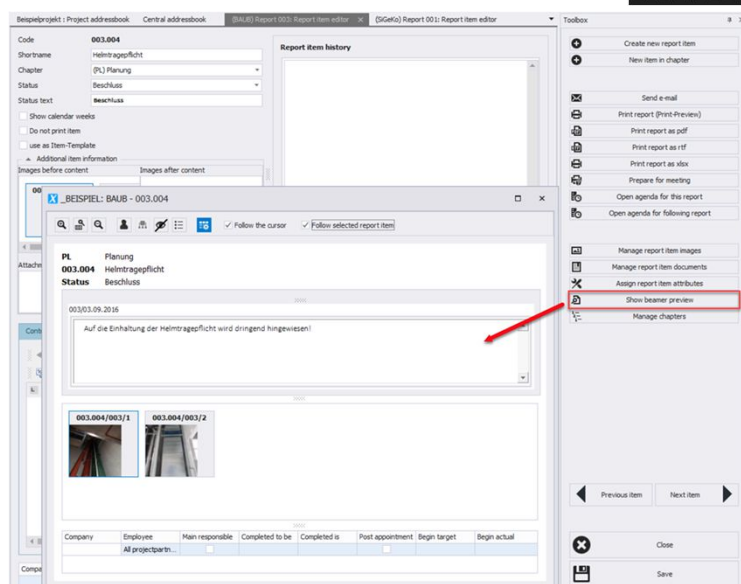
91

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



92

9.6 import report items from another report collection or project

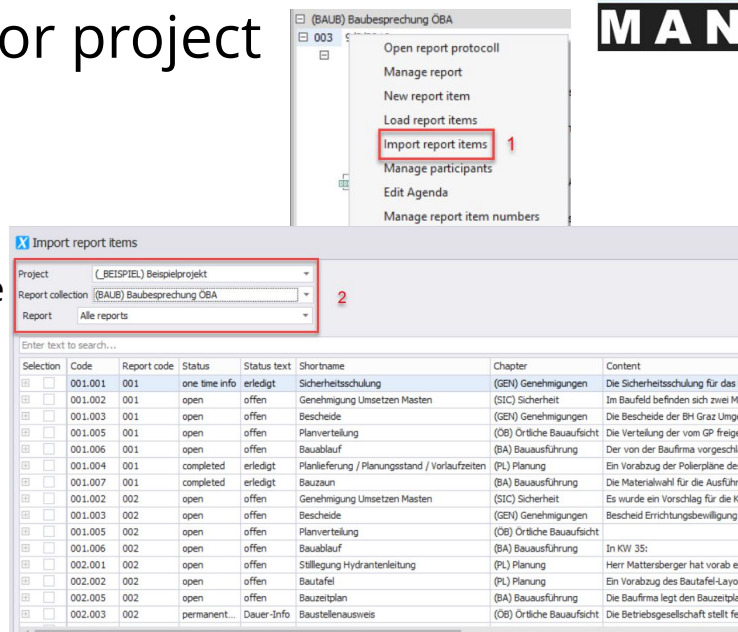


Report items can be taken from another project or report collection.

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)



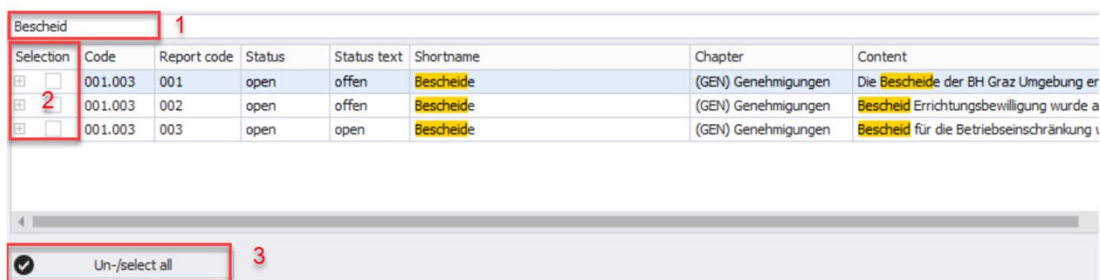
93

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)



94

9.6 import report items from another report collection or project



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

95

9.6 import report items from another report collection or project



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

96

9.7 Report item: Text and involved

Examples



1	Planung	Item	Subject	cr	Responsible	Deadline
1.002.001	Stillelegung Hydrantenleitung	open	0.2 001.003	Bescheide		open
002 / 27.08.2014	Herr Matthesberger hat vorab eine mündliche Zusage über die Stillelegung der das Baufeld querenden Hydrantenleitung erhalten. Eine schriftliche Bestätigung durch die Gemeinde Feldberg muss abgewartet werden.	Frank, Flughafenbetrieb Mattersberger, Plancon: 27.10.2014	001 / 21.08.2014	Die Bescheide der BH Graz Umgebung ergehen lt. Herrn Frank am 22.8.2014 an die Betriebsgesellschaft. Herr Frank wird sie sofort an die Projektpartner verteilen.	Frank, Flughafenbetrieb	22.08.2014
003 / 03.09.2014	Die Stellungnahme der Gemeinde Feldberg ist noch ausständig.	Frank, Flughafenbetrieb Mattersberger, Plancon: 27.10.2014	002 / 27.08.2014	Bescheid Errichtungsbewilligung wurde am 27.8.2014 von Herrn Frank verteilt. • Noch ausständige Bescheide: • Wasserrecht • Betriebseinschränkung • Versetzen Mast • Gepäckförderanlage	Frank, Flughafenbetrieb	22.08.2014
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	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
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				

97

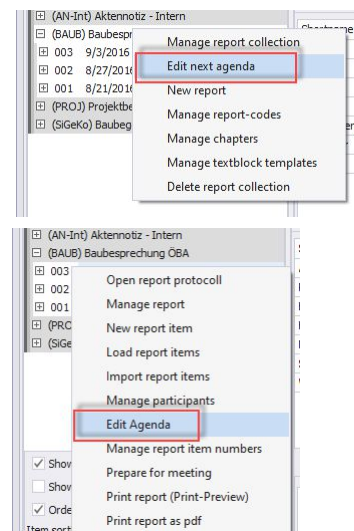
9.8 Invitation & Agenda Function



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.



98

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.

Shortname	Function	Company short	from	until	Comment
Aichberg	BM	Hölzer Bau			
Rauscher	BM	Hölzer Bau			
Busch	ET	Busch & Czerny			
Frank	BH	Flughafenbetrieb			
Mattersberger	GP	Planconsult			
Schnatter	PS	GPS			
Walcherr	PS	GPS			

99

9.8 Invitation & Agenda Function



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:

01.01 Security	01.02 permits	open
001.002 Approval Moving masts	Busch Rauscher	open
001.003 notifications	Frank GPS	open

100

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

PRO MAN

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Beispielprojekt
BESPRECHUNGSBERICHT
 Baubesprechung ÖBA No.: 003

Date of issue: 9/3/2016
 Date of Meeting: 9/3/2016
 Time: from 9:00 AM to 11:00 AM
 Place: GPS-Container
 Subject: Baubau

Project no.: _BEISPIEL
 Draw no.: 1010/BAUB/003
 Chairman: Waldner
 Writer: Kistberger

Participants / Distributors:

Name	First Name	Company	Phone	Mobile	Print	Dist.	Sign.
Waldner	ET	Gesellschaft für Projektentwicklung m.b.H.	+43 316512356		●	●	U
Bach	ET	Bach & Co. Ingenieurbüro für Tabelleverarbeitungs	+43 316512356		●	●	U
Kistberger	BM	Flughafen Betriebsgesellschaft	+43 316512356		●	●	U
Ecker	BM	Dr. Hans Leitner, Ziviltechnisches m.b.H.	+43 316512356		●	●	U
Arndt	BM	Hilber Baugruppe	+43 316512356		●	●	U
Frank	BM	Flughafen Betriebsgesellschaft	+43 316512356		●	●	U
Müller	PS	Gesellschaft für Projektentwicklung m.b.H.	+43 316512356		●	●	U
Schneider	PS	Gesellschaft für Projektentwicklung m.b.H.	+43 316512356		●	●	U
Hofst	BM	Flughafen Betriebsgesellschaft	+43 316512356		●	●	U
Kistberger	ET	Ing. Franz Kistberger, Technisches Büro HKS	+43 316512356		●	●	U
Rauscher	BM	Hilber Baugruppe	+43 316512356		●	●	U
Stadler	GP	Flughafen Betriebsgesellschaft	+43 316512356		●	●	U

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

Next Meeting: Number: 003
 Subject: Planung
 Date: 9/10/2016
 Time: from 9:00 AM to 3:00 PM
 Meeting place: GPS-Container
 Company: Flughafen Betriebsgesellschaft
 Address: AT 1010 Gnad Flughafenstr. 21

From: office@proman.at
 To: teilnehmer1@proman.at; teilnehmer2@frma.at
 Cc:
 Bcc:
 Subject: Projekt: Beispielprojekt, Besprechungsbericht: BAUB Baubesprechung ÖBA, Nr. 004 Vertrieb und Marketing
 Attached: _BEISPIEL Beispielprojekt BAUB 004.pdf (272 KB); Beilage 1.xlsx (14 KB)

Sehr geehrte Damen und Herren,

101

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).

PRO MAN

Send e-mail - Report: BAUB/003

Project shortname: _BEISPIEL Report collection short name: BAUB Report code: 003
 Meeting date: 9/3/2016 Subject:
 Pdf save option: Temporary Filepath: C:\Users\Waksat.Turabek\Desktop\1010__BAUB_003

Textpreview

☒ Use textblocks ☐ Use freetext

E-mail subject: Projekt: Beispielprojekt, Berichtssammlung: BAUB Baubesprechung ÖBA, Nr. 003

Textpreview:

Sehr geehrte Damen und Herren,
 anbei das Protokoll der Sitzung Nr. 003 vom 9/3/2016.

Mit freundlichen Grüßen

E-mail text

Default e-mail textblocks: email

Available e-mail textblocks: email

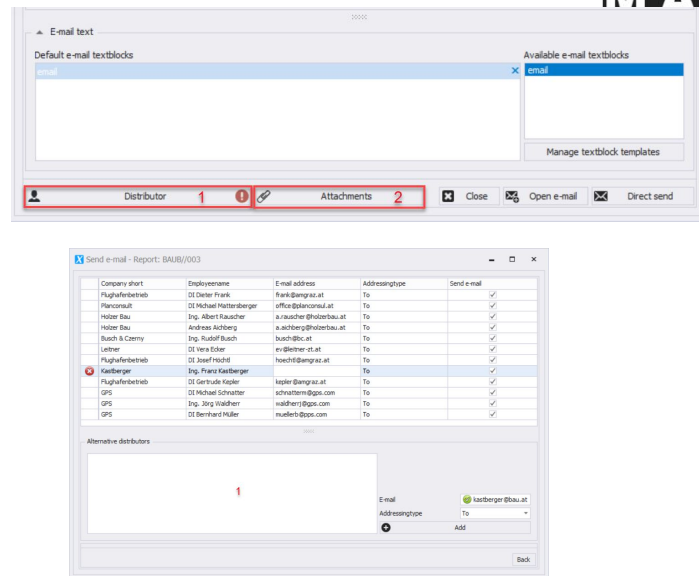
Manage textblock templates

Distributor: Attachments: Close Open e-mail Direct send

102

10.1 E-mail: dispatch

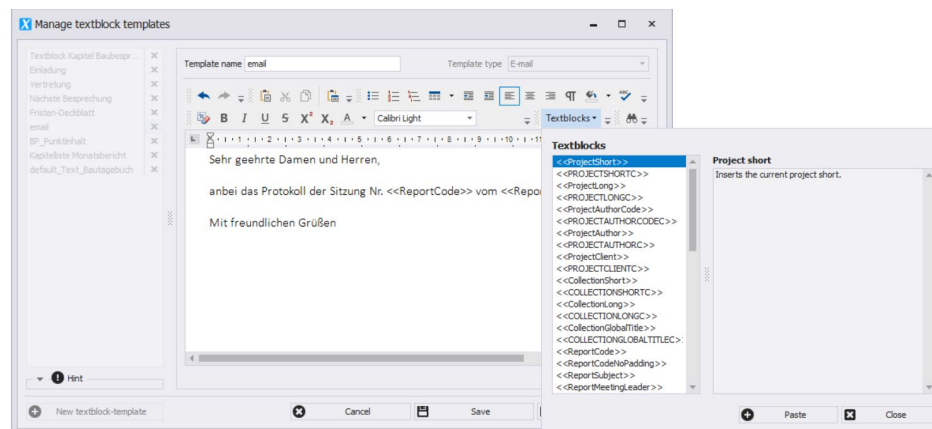
- The report is automatically attached to the e-mail.
- You can manage additional attachments (see 2).
- The distribution list is taken from the subscriber/distributor of your report and can be edited individually (see 1).



103

10.2 Sending an e-mail: text blocks

- enable fast and standardised transmission of reports



104

12. evaluation

Default: all content available

The screenshot displays the PROMAN Phenix application. At the top, the menu bar includes FILE, EDIT, VIEW, TOOLS, and HELP. The TOOLS menu is open, showing options like 'Show central addressbook', 'Settings', 'Central layout manager', 'Laptop-Mode', 'Project & Report Export', 'Project & Report Import', 'Administration', and 'Search and Reporting' (highlighted with a red box). Below the menu is a search bar and a list of project entries. The main window shows a table titled 'Beispielprojekt : Project addressbook' with columns for Report item, Report collection, Chapter short, Chapter long, Report code, Report date, Subject, Status (Report), Status (Item), Content, and Report item short. The table contains multiple rows of project data. On the right, the 'Toolbox' panel is visible, showing 'Filter' and 'Printing' tabs. Under the 'Filter' tab, there are sections for 'Basic selections' (Folders, Report collections, Reports, Report Items) and 'Advanced selection' (Chapters, Item-Status, Employee groups, Companies, Involved, Keywords, Attributes). The 'Item-Status' section is expanded, showing a list of status options with checkboxes. The 'Start analysis' button at the bottom is highlighted with a red box.

105

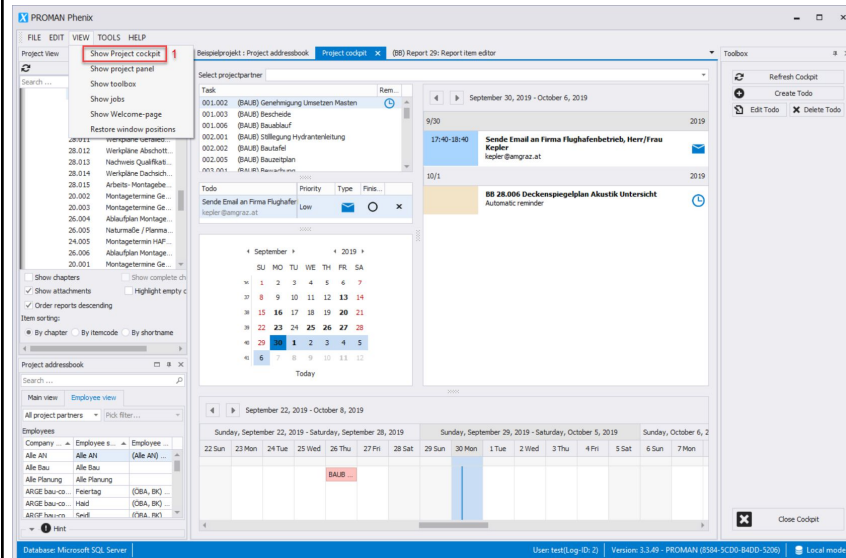
12. evaluation

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

This screenshot focuses on the 'Toolbox' panel, specifically the 'Filter' tab. It shows the 'Basic selections' and 'Advanced selection' sections. The 'Item-Status' section is expanded, displaying a list of status options with checkboxes. The 'Open_Calibri Light_9636273308417943546 (open)' option is selected. Below the status list, there are sections for 'Employee groups', 'Companies', 'Involved', 'Keywords', and 'Attributes'. The 'Start analysis' button at the bottom is highlighted with a red box.

106

13. Project-Cockpit



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

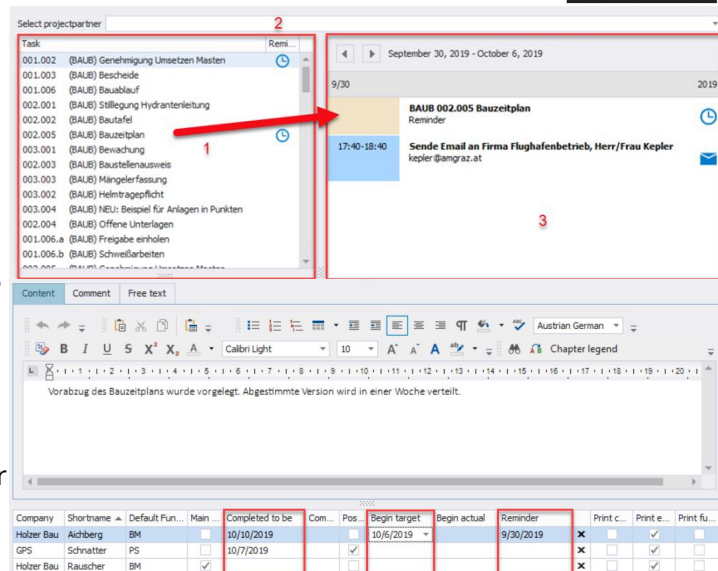
Here you have an overview of all tasks!

107

13. Project-Cockpit



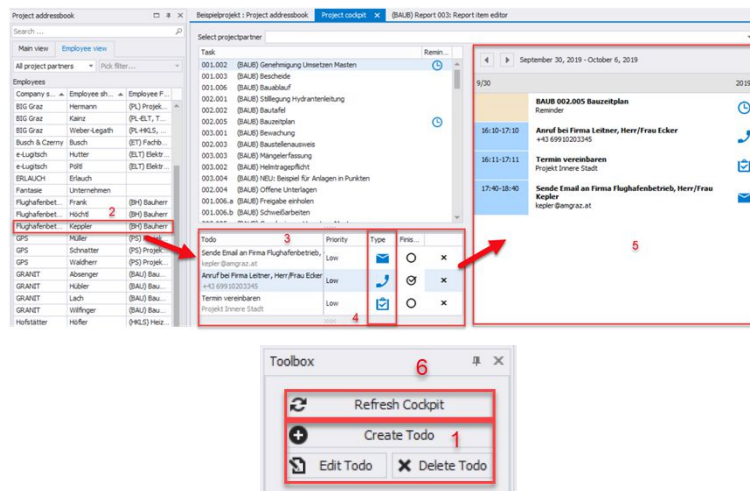
- tasks are automatically generated from the report items of the current reports of your project (see 1).
- You can filter by involved (see 2).
- By right clicking you can open the report item editor.
 - Add a reminder and the task will be displayed in the agenda on the reminder day (see 3). A reminder 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".



108

13. project cockpit

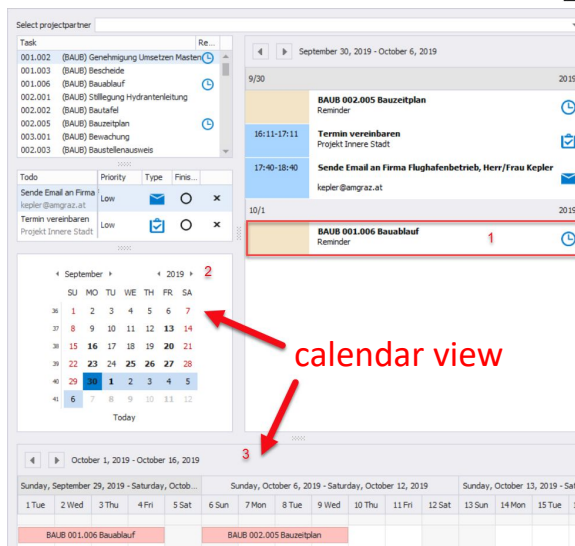
- Reminders can easily be created independently from the current reports using "Create todo" in the toolbox (see 1).
- Drag the desired project partner (see 2) into the task window (see 3).
 - Choose between the options 1) Phone call, 2) E-mail, 3) To-Do - the data such as e-mail address and phone number 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



109

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)



110

14. Example: printout of participants

list

Participants / Distributors:

Name	Company	E-Mail	present	Distr.	temporary
Ing. Jörg Walldherr	GPS	walldherrj@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@planconsult.at	●	●	●



Templates are customizable

Template Example 1, e.g:

- email address
- Temporary presence

Template Example 2

- Invitation column for the next report

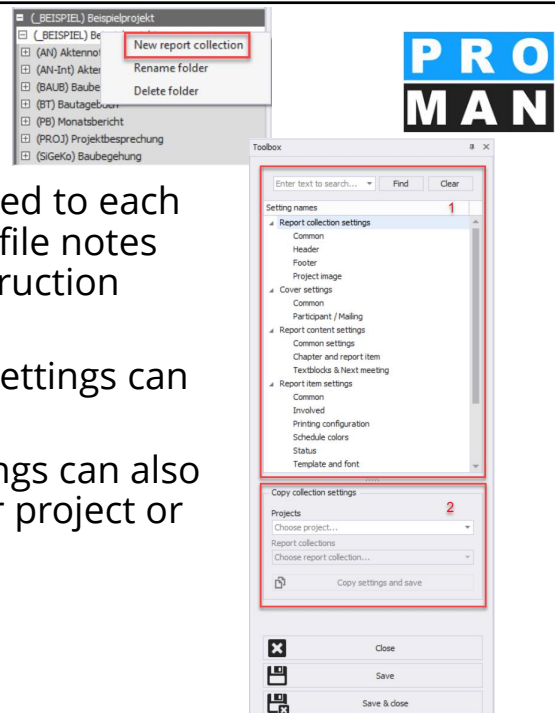
Participants / Distributors:

Name	Company	E-Mail	present	Distr.	Inv.
Ing. Jörg Walldherr	GPS	walldherrj@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@planconsult.at	●	●	○

111

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).



112

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

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

Item	Subject	cr	Responsible	Deadline
ALG	Allgemein			
SIC	Sicherheit			
001.002	Genehmigung Umsetzen Masten			open
001 / 9/21/2016	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.		Busch Rauscher	9/23/2019 10/9/2016

PRO MAN X License: 000A1 PRO MAN 1010/BAUB/003 Page: 1 / 7

Report item settings
Common
Involved
Printing configuration

Involved
Involved - salutation: Nothing
Print view of involved: Herr / Frau
Mr. / Ms.

Report item settings
Common
Involved
Printing configuration
Schedule colors

Common settings
☒ Start printing items on cover (no new page)
☒ Print report items with content or deviant involved persons only
☐ If permanent info, print last item only

113

14.3 Report Collection: Print Settings 3



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
001.002 Bescheide	2
(PL) Planung	4
002.001 Stilllegung Hydrantenleitung	4
002.002 Baufeld	4
003.002 Heilmittelpflicht	4
003.003 Mängelermessung	4

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

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

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

Report item settings
Common
Involved
Printing configuration
Schedule colors

114

14.4 Example printout sorting by item number and chapter



BA Bauausführung				
BAUB 001.006	Baublauf			open
001/21.08.2016	Der von der Baufirma vorgeschlagene Bauablauf für die kommenden zwei Wochen umfasst folgende Tätigkeiten:	Alle Teilnehmer		
	<ul style="list-style-type: none"> 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		
	<ul style="list-style-type: none"> Aufstellen des fixen und des prov. Bauzauns Einrichten Containersiedlung Aufstellen Kran 			
	In KW 36:			
	<ul style="list-style-type: none"> 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, Umlplanung				
BAUB 002.004	Offene Unterlagen			completed 8/8/2016
002/27.08.2016	Folgende Unterlagen/Bestätigungen sind der OBA zu übergeben:	Rauscher	03.09.2016	
	<ul style="list-style-type: none"> K7-Blätter Bieterrückverzeichnisse Unterfertigte Pläne Bestätigung Massenkontrolle 			
003/03.09.2016	K7-Blätter werden in der nächsten Baubesprechung	Rauscher	03.09.2016	
PRO MAN 3.1 Lizenz: © PRO MAN 1010BAUB003 Seite 4 / 5				

1 Planung				
BAUB 002.001	Stillelegung Hydrantenleitung			
002/27.08.2014	Herr Mattesberger hat vorab eine mündliche Zusage über die Stillelegung der das Baufeld querenden Hydrantenleitung erhalten. Eine schriftliche Bestätigung durch die Gemeinde Feldberg muss abgewartet werden.	Frank Mattesberger	27.10.2014	
003/03.09.2014	Die Stellungnahme der Gemeinde Feldberg ist noch ausständig.	Frank Mattesberger	27.10.2014	
BAUB 002.002	Bautafel			
002/27.08.2014	Ein Vorabzug des Bautafel-Layouts wird an Baufirma und OBA übermittelt.	Mattersberger, Planc	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 OBA ausgestellt. Der genaue Ausstellungsablauf für die einzelnen Gewerke wird von der OBA 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 OBA zu übermitteln (Name, Geburtstag, von-bis auf der Baustelle). Die OBA wird diese Angaben stichprobenweise überprüfen.	Alle Teilnehmer		

115

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

BESPRECHUNGSBERICHT				Nr.: 003 am 03.09.2014
Projekt: Beispielpunkt				Projekt-Nr.: _BEISPIEL
Item	Subject	or Responsible	Deadline	
003 / 03.09.2014	Die Stellungnahme der Gemeinde Feldberg ist noch ausständig.	Frank, Flughafenbetrieb Mattersberger, Planc	27.10.2014	
002.002	Bautafel			open
002 / 27.08.2014	Ein Vorabzug des Bautafel-Layouts wird an Baufirma und OBA übermittelt.	Mattersberger, Planc	03.09.2014	
003 / 03.09.2014	GP übergibt das Layout in der nächsten Bazbesprechung. Das Rendering musste neu erstellt werden.	Mattersberger, Planc	03.09.2014	
002.003	Baustellenausweis			Info
002 / 27.08.2014	Die Betriebsgesellschaft stellt fest, dass Baustellenausweise erforderlich sind. Diese werden von der OBA ausgestellt. Der genaue Ausstellungsablauf für die einzelnen Gewerke wird von der OBA 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 OBA zu übermitteln (Name, Geburtstag, von-bis auf der Baustelle). Die OBA wird diese Angaben stichprobenweise überprüfen.	Alle Teilnehmer		
002.004	Offene Unterlagen			completed
002 / 27.08.2014	Folgende Unterlagen/Bestätigungen sind der OBA zu übergeben:	Rauscher, Holzer Ba	03.09.2014	
	<ul style="list-style-type: none"> K7-Blätter Bieterrückverzeichnisse Unterfertigte Pläne Bestätigung Massenkontrolle 			

Report item settings

Common

Involved

Report item layout

Report and report item code only

Print report date for

Report collection shortname

Chapter shortname

Report and report item code only

No report item code

Report item code only

Report item settings

Common

Involved

Involved - salutation

Nothing

Print view of involved persons in report items

Same as in report item

Form for print

Person

Company

Function

Report item settings

Common

Involved

Status

Print status type

Info

Permanent info

show as "Info"

open

in progress

closed

Canceled

Deferred

Resubmission

116

14.6 Examples printout Representation of the item code



Report collection shortname

1 Planung		
BAUB 002.001	Stillelegung Hydrantenleitung	open
002/27.08.2014	Herr Mattesberger hat vorab eine mündliche Zusage über die Stillelegung der das Baufeld querenden Hydrantenleitung erhalten. Eine schriftliche Bestätigung durch die Gemeinde Feldberg muss abgewartet werden.	27.10.2014
003/03.09.2014	Die Stellungnahme der Gemeinde Feldberg ist noch ausständig.	27.10.2014
BAUB 002.002	Bautafel	open
002/27.08.2014	Ein Vorabzug des Bautafel-Layouts wird an Baufirma und OBA übermittelt.	03.09.2014
003/03.09.2014	GP übergibt das Layout in der nächsten Bazbesprechung. Das Rendering musste neu erstellt werden.	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 OBA ausgestellt. Der genaue Ausstellungsablauf für die einzelnen Gewerke wird von der OBA noch bekanntgegeben.	03.09.2014
003/03.09.2014	Es werden keine Baustellenausweise ausgegeben. Die beauftragten Firmen haben stattdessen laufend aktuelle Mitarbeiterlisten an die OBA zu übermitteln (Name, Geburtstag, von-bis auf der Baustelle). Die OBA wird diese Angaben stichprobenweise überprüfen.	Alle Teilnehmer

Chapter Code

1 Planung		
1 002.001	Stillelegung Hydrantenleitung	open
002/27.08.2014	Herr Mattesberger hat vorab eine mündliche Zusage über die Stillelegung der das Baufeld querenden Hydrantenleitung erhalten. Eine schriftliche Bestätigung durch die Gemeinde Feldberg muss abgewartet werden.	27.10.2014
003/03.09.2014	Die Stellungnahme der Gemeinde Feldberg ist noch ausständig.	27.10.2014
1 002.002	Bautafel	open
002/27.08.2014	Ein Vorabzug des Bautafel-Layouts wird an Baufirma und OBA übermittelt.	03.09.2014
003/03.09.2014	GP übergibt das Layout in der nächsten Bazbesprechung. Das Rendering musste neu erstellt werden.	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 OBA ausgestellt. Der genaue Ausstellungsablauf für die einzelnen Gewerke wird von der OBA noch bekanntgegeben.	03.09.2014
003/03.09.2014	Es werden keine Baustellenausweise ausgegeben. Die beauftragten Firmen haben stattdessen laufend aktuelle Mitarbeiterlisten an die OBA zu übermitteln (Name, Geburtstag, von-bis auf der Baustelle). Die OBA wird diese Angaben stichprobenweise überprüfen.	Alle Teilnehmer

117

14.7 Examples printout Mention of the involved in the report item



Same as in report item

1 Planung		
BAUB 002.001	Stillelegung Hydrantenleitung	open
002/27.08.2014	Herr Mattesberger hat vorab eine mündliche Zusage über die Stillelegung der das Baufeld querenden Hydrantenleitung erhalten. Eine schriftliche Bestätigung durch die Gemeinde Feldberg muss abgewartet werden.	Di Dieter Frank Di Michael Mattersbe 27.10.2014
003/03.09.2014	Die Stellungnahme der Gemeinde Feldberg ist noch ausständig.	Di Dieter Frank Di Michael Mattersbe 27.10.2014
BAUB 002.002	Bautafel	open
002/27.08.2014	Ein Vorabzug des Bautafel-Layouts wird an Baufirma und OBA übermittelt.	Di Michael Mattersbe 03.09.2014
003/03.09.2014	GP übergibt das Layout in der nächsten Bazbesprechung. Das Rendering musste neu erstellt werden.	Di Michael Mattersbe 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 OBA ausgestellt. Der genaue Ausstellungsablauf für die einzelnen Gewerke wird von der OBA noch bekanntgegeben.	Di Michael Schnatter 03.09.2014
003/03.09.2014	Es werden keine Baustellenausweise ausgegeben. Die beauftragten Firmen haben stattdessen laufend aktuelle Mitarbeiterlisten an die OBA zu übermitteln (Name, Geburtstag, von-bis auf der Baustelle). Die OBA wird diese Angaben stichprobenweise überprüfen.	All participants

Person & function

1 Planung		
BAUB 002.001	Stillelegung Hydrantenleitung	open
002/27.08.2014	Herr Mattesberger hat vorab eine mündliche Zusage über die Stillelegung der das Baufeld querenden Hydrantenleitung erhalten. Eine schriftliche Bestätigung durch die Gemeinde Feldberg muss abgewartet werden.	Frank BH Mattersberger GP 27.10.2014
003/03.09.2014	Die Stellungnahme der Gemeinde Feldberg ist noch ausständig.	Frank BH Mattersberger GP 27.10.2014
BAUB 002.002	Bautafel	open
002/27.08.2014	Ein Vorabzug des Bautafel-Layouts wird an Baufirma und OBA übermittelt.	Mattersberger GP 03.09.2014
003/03.09.2014	GP übergibt das Layout in der nächsten Bazbesprechung. Das Rendering musste neu erstellt werden.	Mattersberger GP 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 OBA ausgestellt. Der genaue Ausstellungsablauf für die einzelnen Gewerke wird von der OBA noch bekanntgegeben.	Herr Schnatter PS 03.09.2014
003/03.09.2014	Es werden keine Baustellenausweise ausgegeben. Die beauftragten Firmen haben stattdessen laufend aktuelle Mitarbeiterlisten an die OBA zu übermitteln (Name, Geburtstag, von-bis auf der Baustelle). Die OBA wird diese Angaben stichprobenweise überprüfen.	All participants

118

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.

119

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



1 Planung			
BAUB 002.001	Stillelegung Hydrantenleitung		open
002/27.08.2014	Herr Mattesberger hat vorab eine mündliche Zusage über die Stillelegung der das Baufeld querenden Hydrantenleitung erhalten. Eine schriftliche Bestätigung durch die Gemeinde Feldberg muss abgewartet werden.	Frank Mattesberger	27.10.2014
003/03.09.2014	Die Stellungnahme der Gemeinde Feldberg ist noch ausständig.	Frank Mattesberger	27.10.2014
BAUB 002.002	Bautafel		open
002/27.08.2014	Ein Vorabzug des Bautafel-Layouts wird an Baufirma und OBA übermittelt.	Mattersberger	03.09.2014
003/03.09.2014	GP übergibt das Layout in der nächsten Baubesprechung. 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 OBA ausgestellt. Der genaue Ausstellungsablauf für die einzelnen Gewerke wird von der OBA noch bekanntgegeben.	Herr Schnatter	03.09.2014
003/03.09.2014	Es werden keine Baustellenausweise ausgeben. Die beauftragten Firmen haben stattdessen laufend aktuelle Mitarbeiterlisten an die OBA zu übermitteln (Name, Geburtstag, von-bis auf der Baustelle). Die OBA wird diese Angaben stichprobenweise überprüfen.	All participants	
BAUB 002.004 Offene Unterlagen			
002/27.08.2014	Folgende Unterlagen/Bestätigungen sind der OBA zu übergeben:	Rauscher	completed
	<ul style="list-style-type: none"> K7-Blätter Bieterrückenverzeichnis Unterfertigte Pläne Bestätigung Massenkontrolle 		
003/03.09.2014	<ul style="list-style-type: none"> K7-Blätter werden in der nächsten Baubesprechung übergeben Bieterrückenverzeichnis erledigt Pläne werden unterfertigt Massendifferenzliste wird bis zur nächsten Baubesprechung an die OBA übermittelt 	Rauscher	03.09.2014
BAUB 002.005 Bauzeitplan			
002/27.08.2014	Die Baufirma legt den Bauzeitplan in der nächsten Baubesprechung vor. Zuvor wird er am Montag 9:00 Uhr mit der OBA abgestimmt.	Herr Schnatter Rauscher	open
003/03.09.2014	Vorabzug des Bauzeitplans wurde vorgelegt. Abgestimmte Version wird in einer Woche verteilt.	Herr Schnatter Rauscher	01.09.2014

120

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

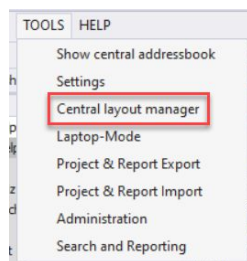


- You can easily change the formatting of existing statuses
- In the bottom line you can create your own status at any time, e.g.
 - Decision, CRQ, determination
 - Open with traffic light colours (red, orange, green)

Name	Status type	Display text	Font	Font size	Bold	Italic	Underlined	Alignment	Backgroundcolor	Default
Beschluss	one time info	Beschluss	Calibri Light	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Left	255, 255, ...	<input type="checkbox"/>
DauerInfo Stan...	permanent Info		Calibri Light	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Left	255, 255, ...	<input checked="" type="checkbox"/>
erledigt Standard	completed		Calibri Light	10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Left	255, 255, ...	<input checked="" type="checkbox"/>
inbearbeitung S...	in progress		Calibri Light	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Left	0, 255, 25...	<input checked="" type="checkbox"/>
Info Standard	one time info		Calibri Light	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Left	255, 255, ...	<input checked="" type="checkbox"/>
offen Standard	open		Calibri Light	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Left	255, 255, ...	<input checked="" type="checkbox"/>
storniert Standard	canceled		Calibri Light	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Left	0, 255, 25...	<input checked="" type="checkbox"/>
Wiedervorlage ...	Resubmission		Calibri Light	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Left	0, 255, 25...	<input checked="" type="checkbox"/>
zurückgestellt S...	deferred until		Calibri Light	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Left	255, 255, ...	<input checked="" type="checkbox"/>

121

15. print layout



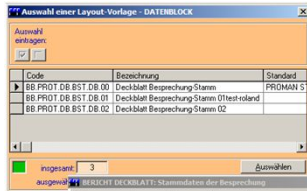
• Creation of templates for

- Front page
 - Report core data
 - Participants
- Report content
 - chapters
 - Report item

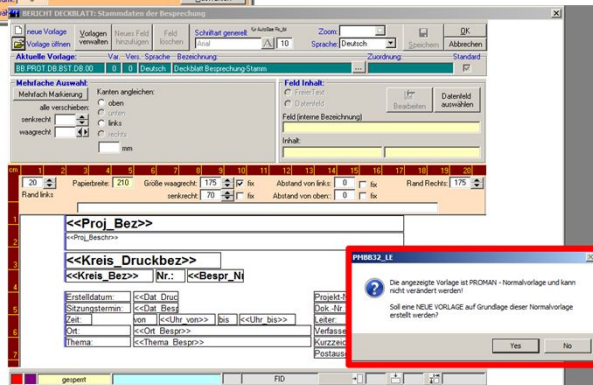
- Standard templates are included. If nothing else is defined, these are used.

122

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.



123

15.1 Print Layout: report core data

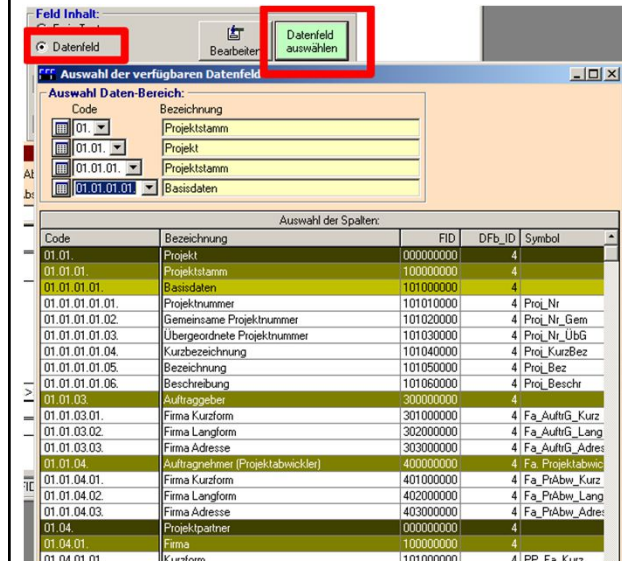


- Fields can easily be extended
 - Free text
 - data field
- positioning
 - On cm position
 - Using the neighbouring fields (e.g. to the right of ..)



124

15.1 Print Layout: report core data

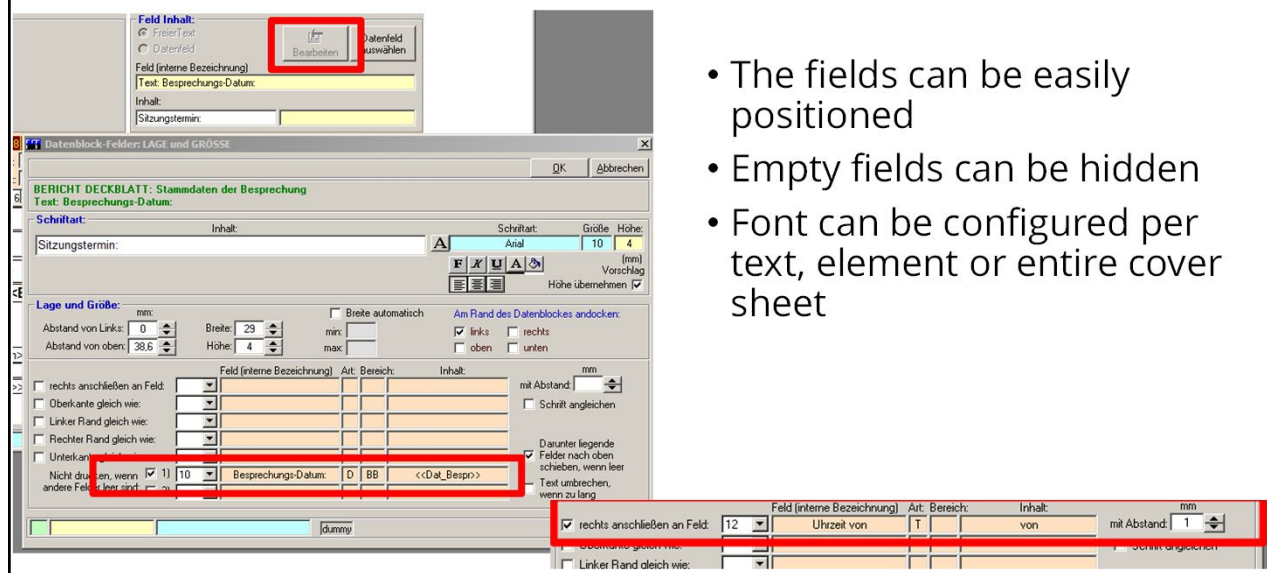


- The data fields make it easy to automatically print data from the project core data.

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

125

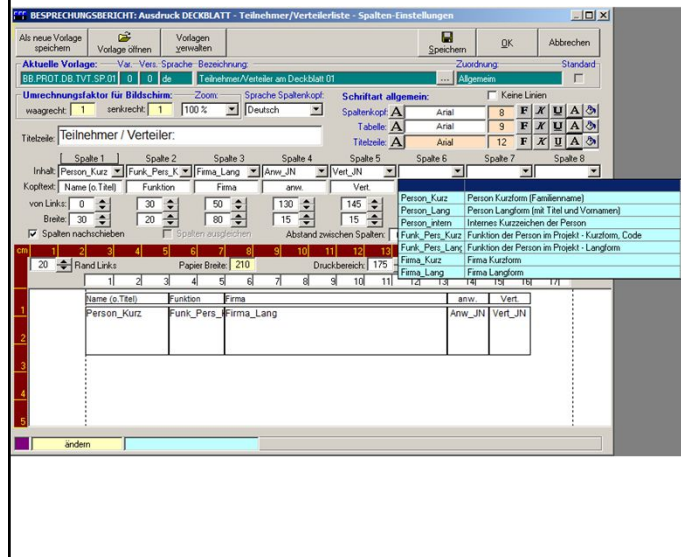
15.1 Print Layout: report core data



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

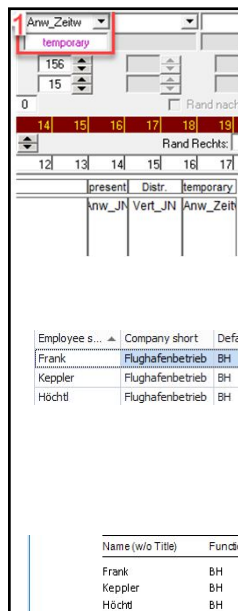
126

15.2 print layout: participants / distribution list



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

127



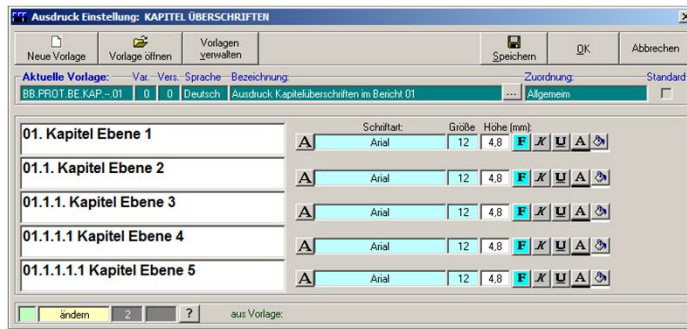
15.3 print layout: temporary



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.

128

15.4 print layout: chapters

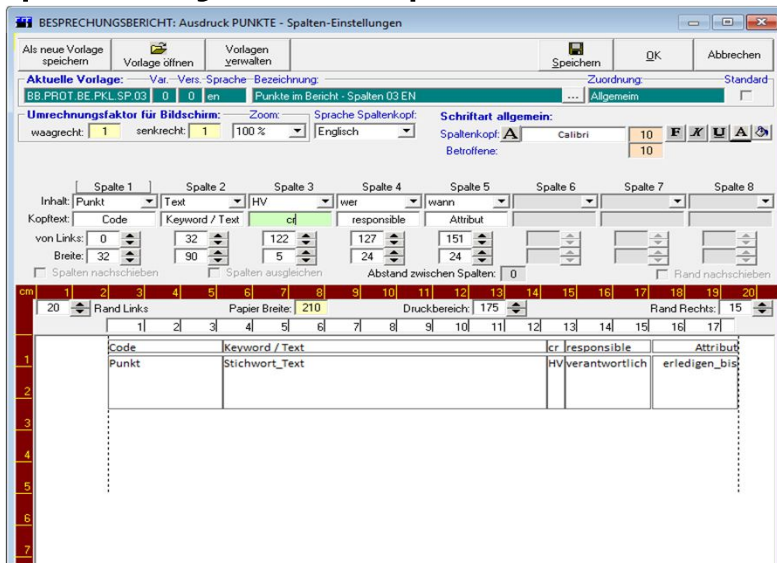


Design of chapters :

- font
- Bold, italic, underline
- background color
- Per level

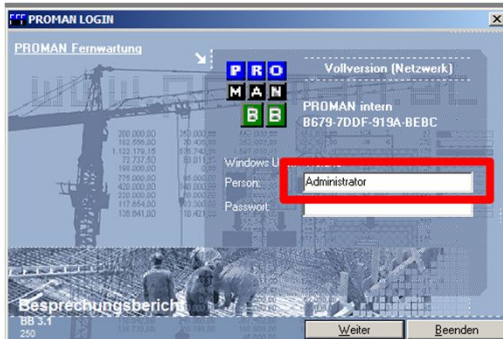
129

15.5 printlayout: report item



130

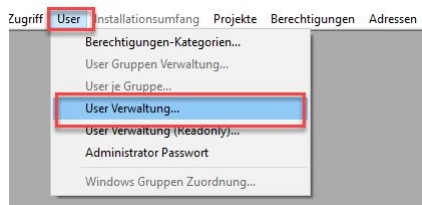
16. user administration and rights control



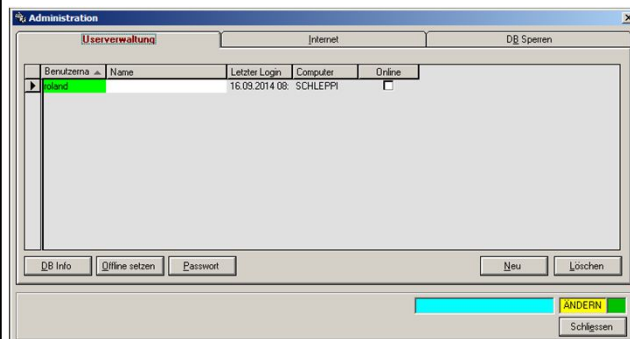
- With the link admin (PM_Admin1.exe) possible
 - Login as "Administrator"
- User
 - create
 - delete
 - Change password
 - release a blocked license

131

16.1 User Administration

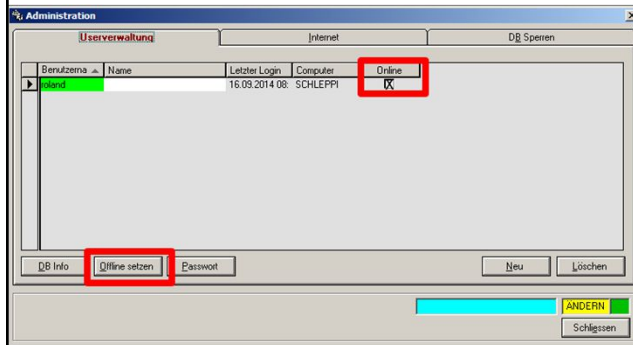


- New
 - Create user
- Delete
 - Delete user



132

16.1 Benutzer Verwaltung



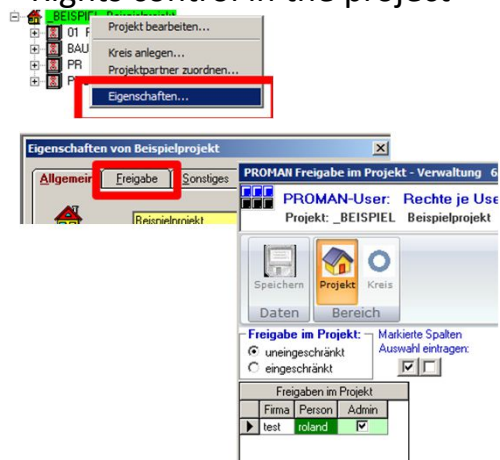
- Set Offline:
 - Release license if it is still locked (e.g. after a crash)
- The user has an active status in the "Online" column.
- To set offline:
 - Select user
 - then click on "Set Offline".

133

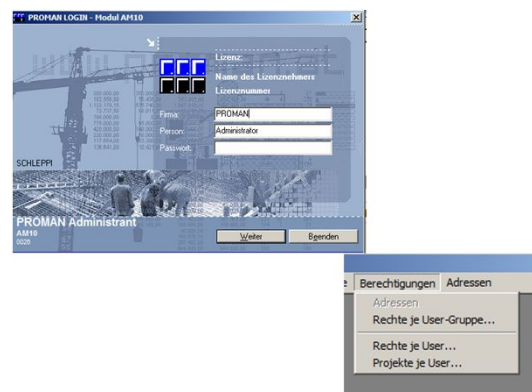
16.2 Rights control



- Rights control in the project



- General rights management
 - In PM_ADMIN1.exe!!



134

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

User Name	User Firma	Name Person	User	gelöscht	Adminis- trator	Projekte anlegen	Projekte löschen	Layout bearbeiten	Layout zuordnen	Adressen zentral	Datum eröffnet
administrator	test	Administrator	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
roland	test	test	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

135

16.3 Rights control: General



- Setting for project visibility

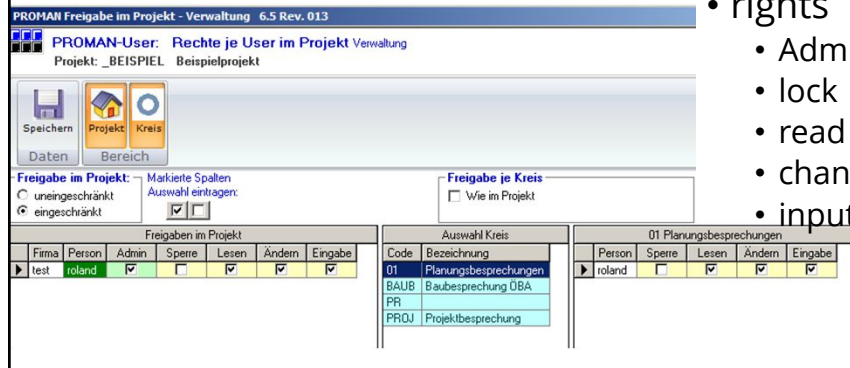
Projekt Nummer	Projekt Bezeichnung	roland unsichtb
_BEISPIEL	Beispielprojekt	<input type="checkbox"/>

136

16.4 Rights control: in the project

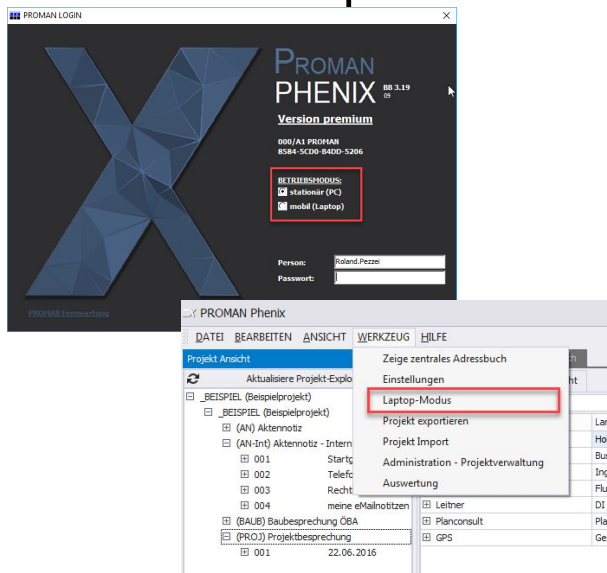


- Rights can be
 - restricted
 - unrestricted
- Rights restricted per project and/or at report collection level
- rights
 - Admin
 - lock
 - read
 - change
 - input



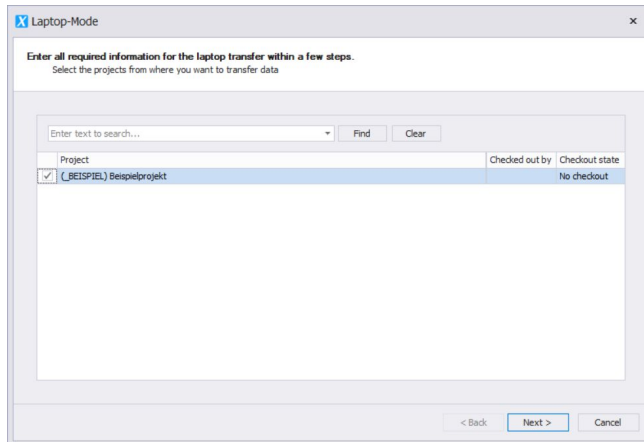
137

17. mobile operation

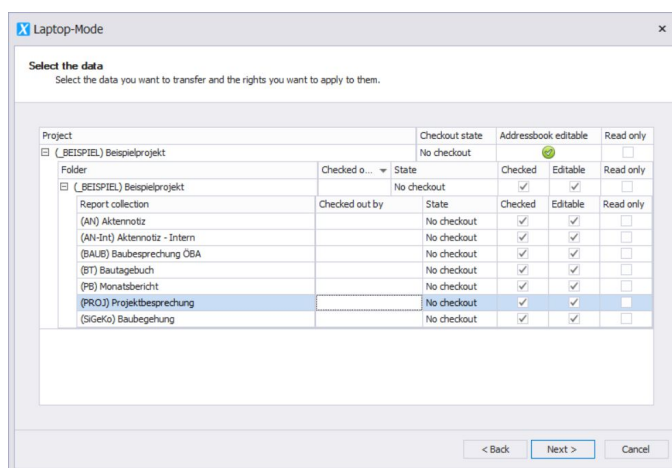


- in stationary operation, projects can be transferred into mobile mode or back at any time
- projects can be opened in mobile mode and also edited

138



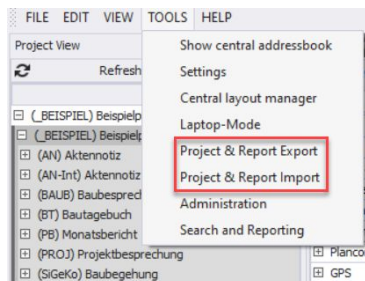
139



18. Import / Export



- Allows data to be exported or imported into report collections

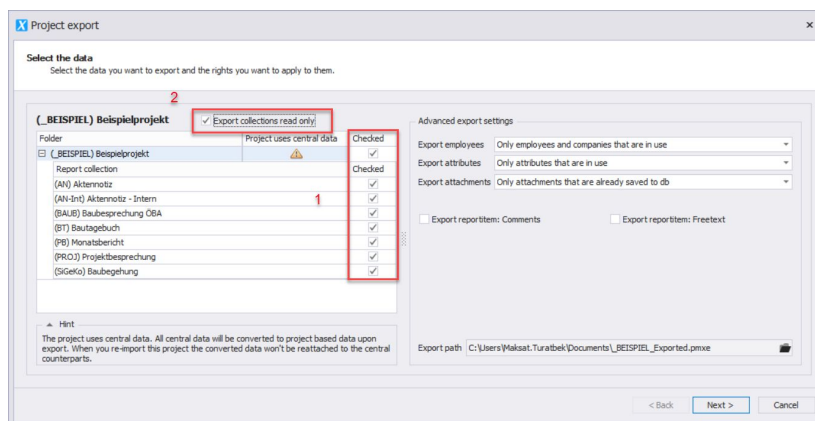


Export can be used for

- Creation of reports from several persons
- Data exchange with partners for further evaluations
- Transmission to AG with restricted reading rights and without comments

141

18.1 Export



- Select the desired report collection (see 1)
- The report collection can be exported with read-only rights, if required (see 2)

142

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)

143

18.1 Import

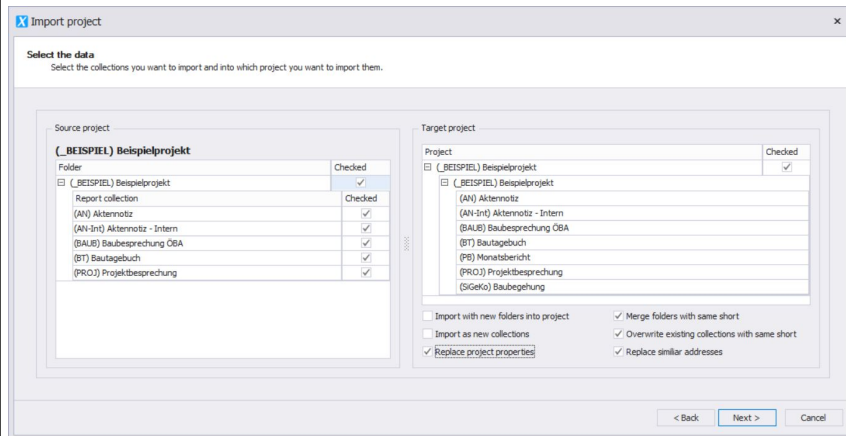


- When importing the report collections, you can define how you want to import them:

- Import as new project
- Import into existing project

144

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

145



Accelerate report creation, management, and delivery!

Save time with PROMAN.

For questions:

- web page
 - <http://www.proman.at>
- Documents
 - tutorial
 - training documents

- PROMAN Support Team

- @ support@proman.at
- Hotline
 - International +43 1 478 05 67
 - from Germany 0800 589 0129

146