



FILER PROJECT

Getting started

Short instructions for using Filer

Change batch sizes

Choose how many pieces the quantities are calculated for. If the selection is not active, the value 1 is used

Folder information setting

The manufacturer and subfolder can be set for the selected parts from the drop-down menus. PDF images are foldered according to the set data

Select assembly

Select part of the BOM folder files to view

Search

Search for part from the part tree

Design tree

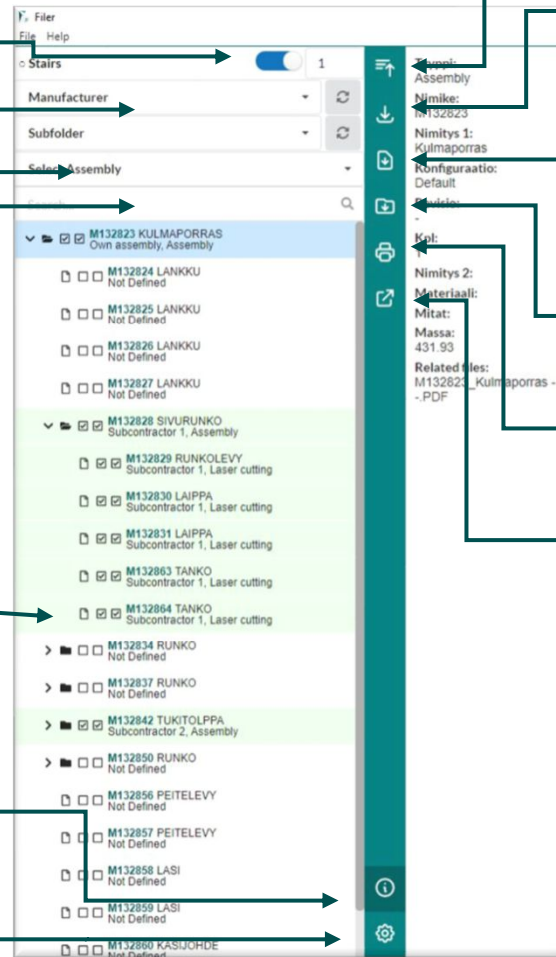
The structure of the assembly is displayed according to the SolidWorks structure

Show component properties

Opens and closes a window that displays the selected section's information and related files.

Settings

Open and close the settings tab.



Read structure

Search for an assembly or part to view by opening its BOM file

Download to folders and create component lists

The files related to the structure are foldered according to the given manufacturer and subfolder information, and manufacturer-specific quantity lists are created for them

Download selected

Files related to the part are copied to the selected folder.

Download selected and children

Files related to the part and its subparts are copied to the selected folder.

Print

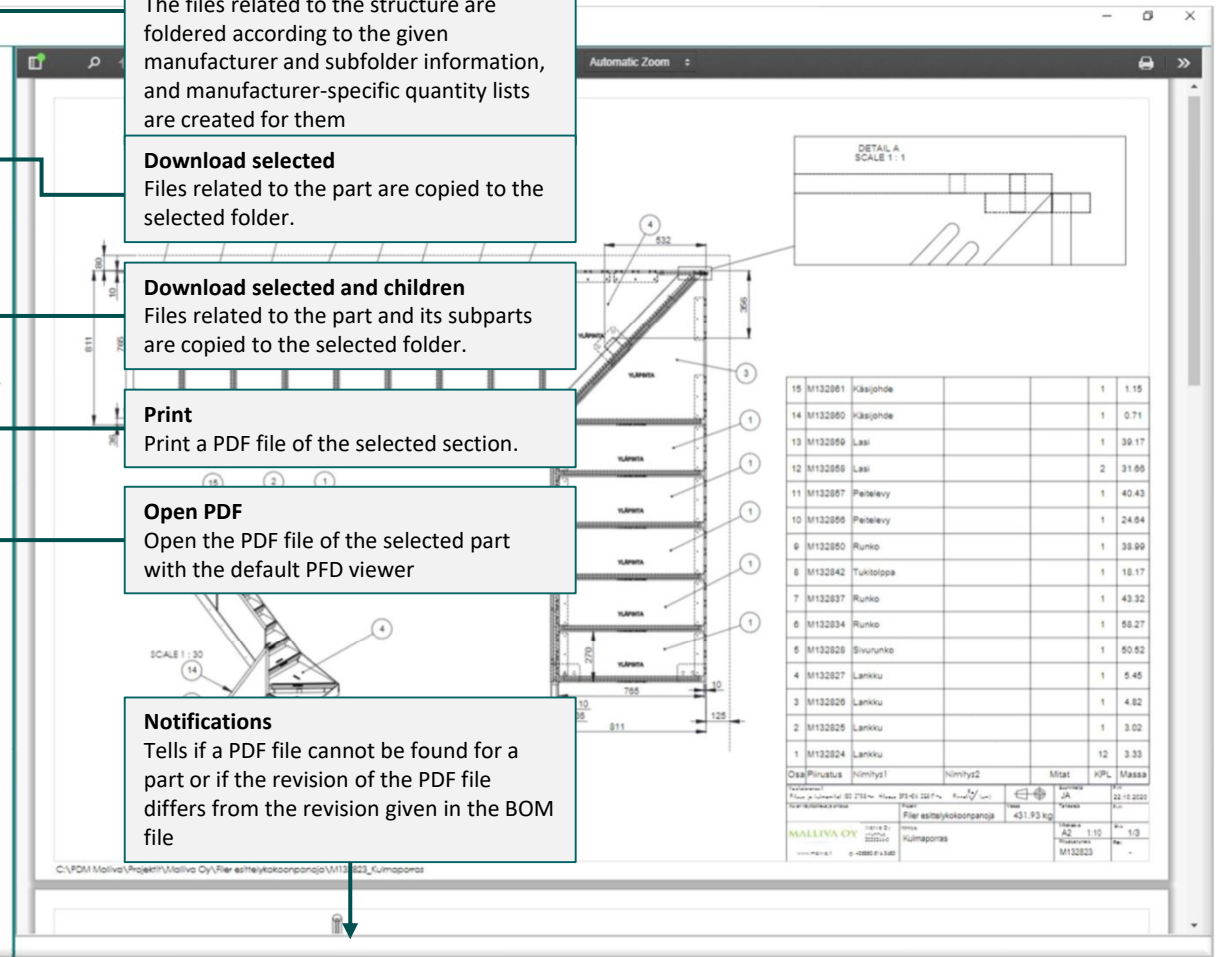
Print a PDF file of the selected section.

Open PDF

Open the PDF file of the selected part with the default PFD viewer

Notifications

Tells if a PDF file cannot be found for a part or if the revision of the PDF file differs from the revision given in the BOM file



15	M132861	Käsihoido		1	1.15
14	M132860	Käsihoido		1	0.71
13	M132859	Lasi		1	39.17
12	M132856	Lasi		2	31.95
11	M132857	Peitelevy		1	40.43
10	M132856	Peitelevy		1	24.64
9	M132850	Runko		1	38.99
8	M132842	Tukitoipaa		1	18.17
7	M132837	Runko		1	43.32
6	M132834	Runko		1	58.27
5	M132828	Sivurunko		1	50.52
4	M132827	Lankku		1	5.45
3	M132826	Lankku		1	4.82
2	M132825	Lankku		1	3.02
1	M132824	Lankku		12	3.33



Settings

Load and restore settings
Load the settings from a previously saved project or restore the default settings.

Show in componentlist
Choose which data to write in the quantity list

General settings
Hide the folder data setting drop down menus in the user interface.
Select that when setting the manufacturer, it is given to all the same parts (same file name) in the structure.

PDF Directory
Set the path to the folder where the PDF and other assembly-related files are stored.

BOM File Directory
Set the path to the folder where the BOM files are saved

The screenshot shows the settings interface with the following sections:

- Buttons:** Load Settings from Project, Reset Settings, Create new BOM file
- Show in Componentlist:** A list of checkboxes for data types: Tyyppi, Tiedostonimi, Konfiguraatio, Nimike, Nimitys 1, Revisio, Kpl, Nimitys 2, Materiaali, Mitat, Massa, Manufacturer, Subfolder.
- Manufacturer Options:** *Clear, *No Folder, Own assembly, Subcontractor 1, Subcontractor 2, and an Add button.
- Subfolder Options:** *Clear, *No Folder, Assembly, Laser cutting, Welding, and an Add button.
- General settings:** Hide manufacturer and subfolder dropdown menus, Change maker to all components with same item filename (Note that same parts may be in use in assemblies which are ordered from different manufacturers).
- Favorite BOM list:** A text field containing a file path and Change/Edit buttons.
- PDF Directory:** A text field containing a file path and a Change button.
- BOM File Directory:** A text field containing a file path and a Change button.

Create new BOM file
Create a new BOM text file. For example, you can create a new top-level assembly for the order, in which you select the parts belonging to the order as parts.

Manufacturer and subfolder options
Add and remove options displayed in the folder information setting drop-down menus.

Favorite BOM list
In the Favorites text file, you can set parts that appear first in the assembly selection drop-down menu. The lines of the text file must have the format "filename"; "caption". (semicolon is used as separator) Filename is the name of the BOM file without the file extension. The legend is the text displayed in the menu. The legend can be left blank, in which case the file name will be displayed in the menu.



Create BOM files

The structure is transferred from SolidWorks to Filer using BOM files. Each assembly and part has its own text file

BOM files are generated with the Export-for-filer macro supplied with the program. Open the desired assembly in Solidworks. Run the structure Export-for-filer macro from the menu tools -> macro -> run. The macro asks if you want to create the transfer files only for the selected assembly or also for the subassemblies. The macro can be found in the program's installation folder C:\Users\"username"\AppData\Local\Programs\Filer Project 2022\Export_macro and can be copied elsewhere if desired. By default, BOM files are saved in the folder c:\Temp\FILER_BOM, which is created automatically when the program is installed.

The save folder can be changed by editing the Export-for-filer.ini file. The export macro also needs a folder for temporary files. This defaults to c:\Temp\export_temp

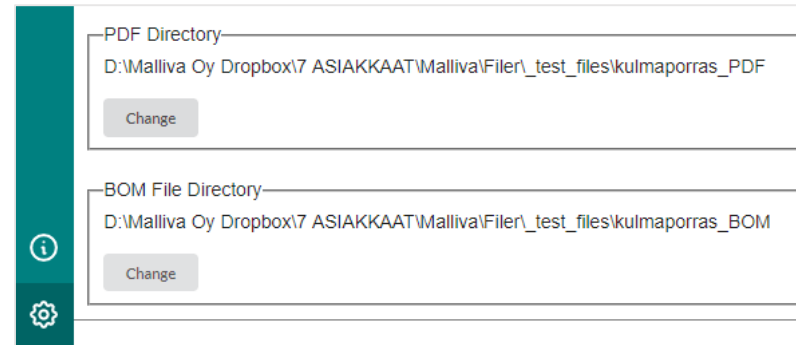
Editing macro settings is presented in more detail in the section "Export macro settings".

```
' folder for the result file
SaveToFolder=c:\Temp\FILER_BOM\
' folder to save the temp-file
TempFolder=c:\Temp\export_temp\
```

Setting file locations in Filer

Filer reads files from two folders. BOM files are saved in the desired folder and PDF, DXF, STEP or any other files related to the model are saved in another folder. Parts related to the same assembly must be saved in the same folder, but the same folder can contain files from several assemblies.

Folder paths are set in Filer under "PDF Directory" and "BOM File Directory". By default, these are c:\Temp\FILER_BOM and c:\Temp\FILER_PDF-DXF and do not necessarily need to be changed.



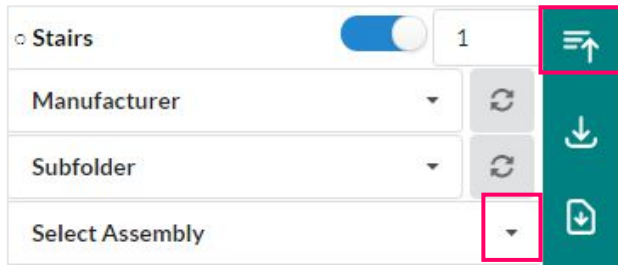


Read the structure to Filer

Open the assembly or part for viewing, read the structure from the button or select from the drop-down menu.

When searching with the Read structure button, the BOM file does not have to be located in the BOM File Directory folder.

You can search for a part based on the file name from the drop-down menu. Favorites can also be assigned to it, which appear at the beginning of the list. Favorites are defined by a text file that can be defined and edited in the settings.



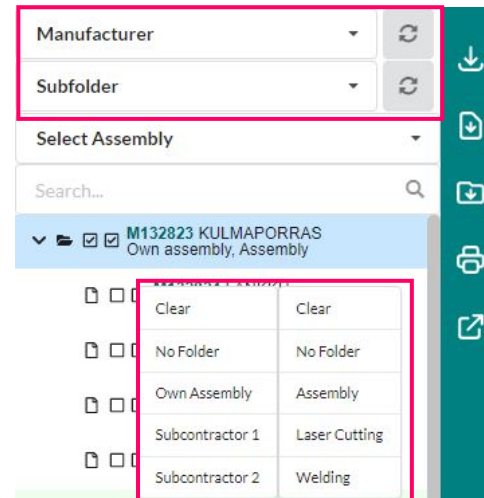
Add folder information

The manufacturer and subfolder can be set for the selected parts from the drop-down menus. PDF images are foldered according to the set information. Selecting the CLEAR clears the field. If the value is set to No Folder, no folder is created for the part, but the files are stored in the root of the upper level.

Folder information can also be entered from the menu opened with the right mouse button

The top-level folder has been designed to tell the manufacturer from whom the parts are ordered, and the sub-folder to tell the manufacturing method. But parts can of course be foldered in other ways too

The subfolder is always set for all the same parts in the structure (same file name). By default, the manufacturer is set only for the selected part. You can choose from the settings that the manufacturer is also set for all the same parts. In this case, it should be noted that the same part can be used in several different configurations, which may be ordered from different manufacturers.





Filing and quantity lists

In foldering, one folder is created for the project under which all files related to the structure are copied. The name of the folder consists of the name of the project and the date. The files related to the structure are foldered according to the given manufacturer and subfolder information. For each manufacturer, a separate folder is created and below it folders for different subfolder options. For each manufacturer, an Orderlist .csv file is created, in which the information of each top-level assembly or part going to that manufacturer is recorded. A Componentlist .csv is created in the folder of each manufacturer, in which the information of each assembly and part belonging to this manufacturer is written, along with the production quantities.

The number of pieces shown on the lists indicates the quantity to be ordered from that manufacturer. If the same part is ordered from different manufacturers, the files are copied to the folders of all manufacturers. If you want to list the total quantities, you can set the same manufacturer for all parts, in which case the parts are copied to one folder and one quantity list is created for them.

If the manufacturer of the part is set to No Folder, the files are copied to the root of the project and not recorded in any quantity list.

If there are several revisions of the same file in the PDF folder, only the latest one is copied. If there are no files for a part, its information is recorded in the quantity list anyway.

Manufacturer	↕	↻	↓
Subfolder	↕	↻	↓

Updating the structure and files

In order for the changes made to the structure on the SolidWorks side to be updated in Filer, a new transfer file must be run for the changed parts and moved to the BOM folder used by Filer. Since each part has its own transfer file, there is no need to run the macro for the entire structure.

The structure must also be read again in Filer. Filer stores the given folder information for parts whose file path in the structure remain the same.

Correspondingly changed PDF images and other files are transferred to Filer's PDF folder. Filer always uses the latest revision of files, so there is no need to delete old drawings. Revision should appear at the end of the file name so that different revisions can be distinguished from each other.



Export macro settings

```
* does macro ask if the user wants to export
Userquestion= TRUE

* ass default, does macro export whole structure (TRUE) or just open model (FALSE)
StructureExport= FALSE

* folder for the result file
SaveToFolder=c:\Temp\FILER_BOM\

* folder to save the temp-file
TempFolder=c:\Temp\export_temp\

* parameters of the master model in order (*xx* area special values - statics)
* parameters can be combined to same field by using "+"
MasterRow=*Type*,*Filename*,*Config*,Item,desc1,version,*PCS*,desc2+standardi+koko,material+materialf,dimensions+koko,weight

*definition texts for the abow defined parameters
MasterRowHeader=Tyyppi,Tiedostonimi,Konfiguraatio,Nimike,Nimitys 1,Revisio,KPL,Nimitys 2,Materiaali,Mitat,Massa

* BOM template = Exportstructure.sldbomtbt whole structure or just open model
```

The format of the BOM files and the operation of the export macro can be modified by changing the Export-for-filer.ini file and the Export-for-filer.sldbomtbt BOM template.

- **Userquestion:** When running the macro, is the user asked if they want to make a BOM only for the open part or also for sub-parts. "TRUE" if you want to be asked. Otherwise "FALSE"
- **StructureExport:** "TRUE" or "FALSE". If false is selected, the macro will by default make only the open part of the transfer file. If true is selected, the migration file will also be created from all sub-files.
- **SaveToFolder:** File path to the folder where the macro writes the transfer files. The folder must exist, and the macro will not create it itself if it is missing.
- **TempFolder:** The file path to the folder where the macro writes temporary files.

- **MasterRow:** Solidworks custom property names for the data that the macro writes to the BOM file. The information given here can be seen in the Filer and on the quantity lists written by the Filer. The first seven of these must be in order: part type, file name, configuration, part number, title, revision and quantity. Those marked with a star do not need to be changed. Others must be given custom Property values where the information can be found. After these mandatory first seven, the desired number of fields can be added. These optional fields don't have to be in a specific order and can be given any custom properties or combinations of these using the "+" sign.
- **MasterRowHeader:** Header fields for the information given above. Free-form text can be entered in the title fields. These are used in Filer as data field names and in quantity lists as header fields. This row must provide as much information as the MasterRow row.
- **BOM pohja:** If you want to make changes to what information is written to the BOM files, the changes must also be made to the Exportstructure.sldbomtbt BOM base. It must have the same data in columns as specified in MasterRow in the same order. The BOM template can be modified in SolidWorks just like any BOM template in SolidWorks.