



EFS.

Excel Filing System.

Agenda.

- ▶ Introduction & Key Elements
- ▶ The List
- ▶ The List & FileStorage
- ▶ The List & DirectFiles
- ▶ The List & MemoFiles
- ▶ The List & TopicFiles
- ▶ The List & LogBooks
- ▶ The ToDo-List
- ▶ Don'ts
- ▶ Examples

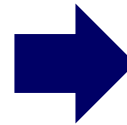
Agenda.

- ▶ **Introduction & Key Elements**
- ▶ The List
- ▶ The List & FileStorage
- ▶ The List & DirectFiles
- ▶ The List & MemoFiles
- ▶ The List & TopicFiles
- ▶ The List & LogBooks
- ▶ The ToDo-List
- ▶ Don'ts
- ▶ Examples

***Collecting data is part of our lives,
however – organizing them is not always easy...***

What does EFS?

- ▶ EFS makes happy!



What is EFS?

- ▶ Excel Filing System (EFS)
 - ▶ **small database** system, **universal template** for administration of data
 - ▶ with fully implemented ToDo List
 - ▶ provides **fast access** to your information

- ▶ EFS: ready to use solution for any kind of data
 - ▶ data (text), hyperlinks, e-mail etc.
 - ▶ file administration (xls, doc, pdf, jpg, mp3, ppt, txt,)
 - ▶ extended search, find and sorting
 - ▶ organizing any type of information, cataloguing & archiving
 - ▶ 100% standard EXCEL

EFS applications.

- ▶ EFS can handle:
 - ▶ CDs, DVDs, books, recipes, member lists
 - ▶ expenses, projects, accounts, addresses
 - ▶ hobbies (wine, cars, pictures, excursions, ...)
 - ▶ notes, protocols, machines
 - ▶ tasks, references, letters, rules & guidelines
 - ▶ calculations, investigation results
 - ▶ music sheets, poems, pictures
 - ▶ records, manuals, leaflets
 - ▶ etc., etc., etc.

Geroldsecker Burg - auf dem Schönberg bei Lahr

> schön erhaltene Burgmauer in unserer Nähe
> netter Fußpfad mit hübschen Stationen für Kinder.
> immer wieder gerne :-)

EFS 4.2 - C

No	Date	Machine No	Machine Type
1	22.01.08	ICOP	Italy

EFS 4.2 - Member List

No	Date	Name	Street	ZIP	Location	Titel	Mobile	e-mail	Society	Remarks	F	Birth
12	2014	Bergmann, Hans	Kleiner Weg 3	77442	Bietzfeld	07814 647		hans.bergmann@posteo.net	Germany	Katholik		
11	2014	Stromberg, Walter	Hauptstr. 19	56435	Westhausen-Oberdorf	07842 65453	0151 864 66 48	stromeberg@tuttnet.de	Spain-Exp			19.04.1941
10	2014	Michels, Barbara	Am Lennberg 15a	70576	Freitalberg	07544 653773	0151 84 64 34	barbara@tuttnet.de	Germany	Volunte		
9	2014	Beckstein, ???	Vor der Weide 9	70576	Freitalberg	07544 77074		beckstein@posteo.net	Germany	Volunte		
8	2014	Schneidemann, Mathis	Lunnenbergstr. 7	74674	Mallbergdorf	07583 95933			Spain-Exp			
7	2014	Michels, Paul-Günter	Am Lennberg 15a	70576	Freitalberg	07544 653773	0172 864 66 85	pauguent@tuttnet.de	Germany	Politiker		17.04.1941
6	2014	Society, Orchestra							Germany			
5	2014	Amels, Hans-Michael	Hauptstr. 78	68843	Heimberg	06318 95822		hansmichael@posteo.net	Spain-Exp			
4	2014	Schwenberger, Siep	Hofstr. 6	75883	Prüsdorf	07563 993496	0151 78 57 30 22	schwenberger.siep@tuttnet.de	Spain-Exp			Stroh Michael im Tauchdienst
3	2014	Müller-Schwen, Doris	Hauptstr. 1	56435	Westhausen-Oberdorf	07842 54332	0151 18 64 38 48	doris.mueller@tuttnet.de	Spain-Exp			

drawings
L M-1784M.pdf
L M-1784M.xls

kladi...
Pipe_Ü...
Pipe_Ü...

What are key elements of EFS?

- ▶ powerful standard EXCEL sheet
- ▶ helpful functions
 - ▶ „SEARCH 4“
 - ▶ „CAT 5“
 - ▶ „DOC N“
 - ▶ „SortBySearch“
 - ▶ „DirectFile“
 - ▶ „LogBook“
 - ▶ „ToDo-List“
 - ▶ ... and many more :-)

12	22.04.15	Bergmann, Hans	Kleiner Weg 3	77442	Bleichdorf	07854 847
11	21.04.15	Stromberg, Martin	Hauptstr. 19	58435	Wennhausen - Oberdorf	07942 65463
10	21.04.15	Michels, Barbara	Am Lemmberg 18a	79976	Freitalberg	07944 8583773
9	21.04.15	Beckstein, ???	Vor der Winde 9	79976	Freitalberg	07944 77674
8	21.04.15	Schneidermann, Martha	Lummlbergerstr. 7	76674	Mallbergdorf	07583 95933
7	21.04.15	Mi			Freitalberg	07944 8583773

Search Keyword [f]		add Keyword [b]	
		in Column [e] <	
Name		Street ZIP	
open ToDo [i] ◀▶			
Bergmann, Hans		Kleiner Weg 3 77442	
Stromberg, Martin		Hauptstr. 19 58435	

Categories [k]		Σ [a]	↓ A Z	<
e-mail		Society		Re
				Cre Upd
n@googlemail.com		Orchestra		Klarinett
ze@hotmail.com		Sports Club		
64@hotmail.com		Orchestra		Violine

=> Access Files [w]	Copy File to Category Folder	=> Category Folder
	DirectFile	both Folders
Location	Tel	Mobile
Bleichdorf	07854 847	

Powerful standard EXCEL sheet.

- ▶ standard use of EXCEL
 - ▶ text, numbers etc.
 - ▶ copy / paste
 - ▶ formating (e.g. text color)
 - ▶ column width & row height
 - ▶ e-mails & hyperlinks

Association - Orchestra							Orchestra			C		
Beckstein, ???	Vor der Winde 9	79976	Freitalberg	07944 77674	0172 756 84 22	beckchen@googlemail.com	Orchestra	Violine		X		
Bergmann, Hans	Kleiner Weg 3	77442	Bleichdorf	07854 847		hans-bergmann@googlemail.com	Orchestra	Bratsche	www.viola61.de	X		1961(?)
Michels, Barbara	Am Lemmberg 18a	79976	Freitalberg	07944 8583773	0151 44 94 48 34	posaune64@hotmail.com	Orchestra	Violine		X		
Michels, Paul-Günther	Am Lemmberg 18a	79976	Freitalberg	07944 8583773	0172 886 48 85	posaune64@hotmail.com	Orchestra	Posaune :-)		T		27.04.1964
Association - Sports Club							Sports Club			C		
Arnold, Hans-Michael	Hauptstr. 78	68843	Heisenberg	06839 85822		arnold.hm@googlemail.com	Sports Club			X		
Knopf, Jim	Seilerstr. 17	74839	Lummerdorf	07844 785875	0171 485 83 06	knopf@gmx.de	Sports Club		www.knopf.de	X		02.12.2002

Powerful standard EXCEL sheet.

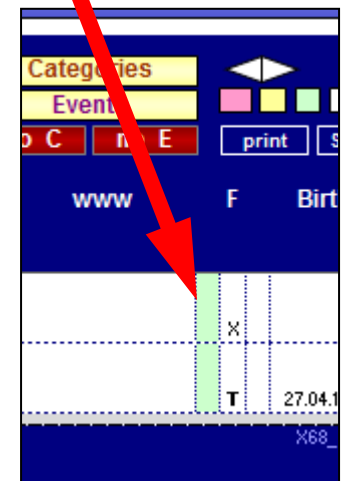
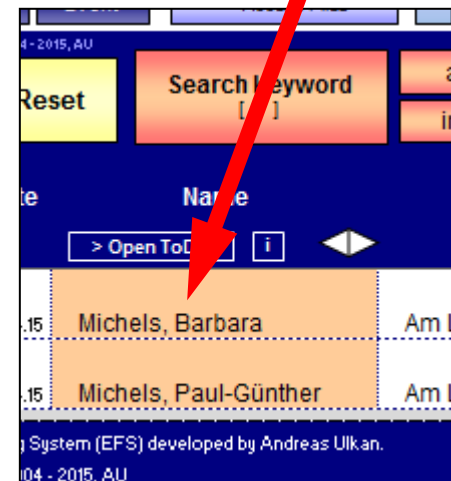
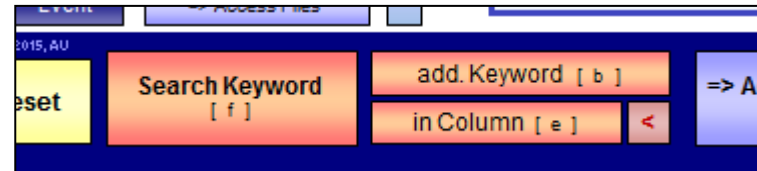
- ▶ improved use of EXCEL
 - ▶ „New Row“ function
 - ▶ „SEARCH 4“ function
 - ▶ „Filter Reset“ function
 - ▶ etc.

Interface showing a table with columns: No, Date, Name, Street, ZIP, Location. A red box highlights the "New Row" button. Other buttons include "Filter Reset", "Search Keyword", "add. Keyword", "in Column", and "Access Files".

No	Date	Name	Street	ZIP	Location
12	22.04.15	Bergmann, Hans	Kleiner Weg 3	77442	Bleichdorf
11	21.04.15	Stromberg, Martin	Hauptstr. 19	58435	Wennhausen Oberdorf
10	21.04.15	Michels, Barbara	Am Lemmberg 18a	79976	Freitalberg
9	21.04.15	Beckstein, ???	Vor der Winde 9	79976	Freitalberg
		Bergmann, Hans	Kleiner Weg 3	77442	Bleichdorf
		Stromberg, Martin	Hauptstr. 19	58435	Wennhausen - Oberdorf
		Michels, Barbara	Am Lemmberg 18a	79976	Freitalberg
		Beckstein, ???	Vor der Winde 9	79976	Freitalberg
		Schneidermann, Martha	Lummburgerstr. 7	76674	Mallbergdorf
		Michels, Paul-Günther	Am Lemmberg 18a	79976	Freitalberg
		Association - Orchestra			
		Arnold, Hans-Michael	Hauptstr. 78	68843	Heisenberg
		Schwemberger, Sepp	Hoher Meiler 6	75883	Polzdorf

SEARCH 4 function.

- ▶ search keyword
 - ▶ in pre-defined columns
 - ▶ incl. „keywords“ column
 - ▶ in selected column
 - ▶ „Prio-Search“
 - ▶ specified search
 - ▶ up to four search levels
 - ▶ return to previous level
- ▶ search by categories
- ▶ search by color code



CAT 5 function.

- ▶ categories
 - ▶ up to five categories per entry
 - ▶ category administration
 - ▶ category window
 - ▶ category filter
 - ▶ category sorting
 - ▶ related filing options

The screenshot displays the EFS software interface. On the left, a table lists entries with columns for 'No', 'Date', and 'Name'. The 'Name' column contains names like 'Bergmann, Hans', 'Stromberg, Martin', 'Michels, Barbara', 'Beckstein, ???', 'Schneidermann, Martha', 'Michels, Paul-Günther', 'Association - Orchestra', 'Arnold, Hans-Michael', 'Schwernberger, Sepp', 'Milotka-Schwern, Doris', 'Knopf, Jim', and 'Association - Sports Club'.

In the center, a 'Categories' window titled 'Actually listed categories' is open. It shows a list of categories and their counts:

Category	#
Ballet	76
Dog's Training	43
Orchestra	6
Reader's Club	59
Sailor Association	21
Sports Club	1
Stamps Club	15

Below the list are buttons for 'insert category' and 'access files directly', and a 'cancel' button at the bottom.

On the right, a 'Prio-Filter' window titled 'Orchestra' is open. It shows a table with columns for 'mobile', 'e-mail', 'Association', and 'Remarks'. The table is sorted by the 'Association' column. The data rows are:

mobile	e-mail	Association	Remarks
		Orchestra	
56 84 22	beckchen@googlemail.com	Orchestra	Violine
	hans-bergmann@googlemail.com	Orchestra	Bratsche
94 48 34	posaune64@hotmail.com	Orchestra	Violine

Sort 2 function.

- ▶ sort column 1 (and sort column 2) can be defined
- ▶ button A-Z | sort / unsort

EF S v4.2, (c) 2004-2015, AU

EFS 4.2 - Member List

sorted: column "Association"

Members

Filter Reset Search Keyword [f] add. Keyword [b] in Column [e] => Access Files [w] Copy File to Category Folder DirectFile => Category Folder both Folders Categories [k] Σ [a] A Z Categories Events no C no E print S

No	Date	Name	Street	ZIP	Location	Tel	Mobile	e-mail	Association	Remarks	www	F	Birth
6	21.04	Association - Orchestra							Orchestra			C	
9	21.04	Beckstein, ???	Vor der Winde 9	79976	Freitalberg	07944 77674	0172 756 84 22	beckchen@googlemail.com	Orchestra	Violine		X	
12	22.04	Bergmann, Hans	Kleiner Weg 3	77442	Bleichdorf	07854 847		hans-bergmann@googlemail.com	Orchestra	Bratsche	www.viola61.de	X	1961 (?)
10	21.04	Michels, Barbara	Am Lemmberg 18a	79976	Freitalberg	07944 8583773	0151 44 94 48 34	posaune64@hotmail.com	Orchestra	Violine		X	
7	21.04	Michels, Paul-Günther	Am Lemmberg 18a	79976	Freitalberg	07944 8583773	0172 886 48 85	posaune64@hotmail.com	Orchestra	Posaune :-)		T	27.04.1964
1	21.04	Association - Sports Club							Sports Club			C	
5	21.04	Arnold, Hans-Michael	Hauptstr. 78	68843	Heisenberg	06839 85822		arnold.hm@googlemail.com	Sports Club			X	
2	21.04	Knopf, Jim	Seilerstr. 17	74839	Lummerdorf	07844 785875	0171 485 83 06	knopf@gmx.de	Sports Club		www.knopf.de	X	02.12.2002
3	21.04	Milotka-Schwern, Doris	Hauptstr. 1	58435	Wennhausen - Oberdorf	07942 56332	0151 18 94 88 48	milotka-d@phantasie.de	Sports Club			X	
8	21.04.15	Schneidermann, Martha	Lummburgerstr. 7	76674	Mallbergdorf	07583 95933		schwernberger.sepp@hotfix	Sports Club	Sohn Michael im		X	

SortBySearch function.

- search results ordered with search / filter action

new Row tel mom UF M EFS 4.2 - Member List Prio-Filter Sports Club sorted: column "Association"									
2004 - 2015, AU Search Keyword [f] add. Keyword [b] in Column [e] => Access Files [w] Copy File to Category Folder => Category Folder Categories [k] Σ [a] ↓ A Z									
Date	Name	Street	ZIP	Location	Tel	Mobile	e-mail	Association	Re
> Open ToDo i ◀▶									
1.04.15	Association - Sports Club							Sports Club	
1.04.15	Arnold, Hans-Michael	Hauptstr. 78	68843	Heisenberg	06839 85822		arnold.hm@googlemail.com	Sports Club	
1.04.15	Knopf, Jim	Seilerstr. 17	74839	Lummerdorf	07844 785875	0171 485 83 06	knopf@gmx.de	Sports Club	
1.04.15	Milotka-Schwern, Doris	Hauptstr. 1	58435	Wennhausen - Oberdorf	07942 56332	0151 18 94 88 48	milotka-d@phantasie.de	Sports Club	
1.04.15	Schneidermann, Martha	Lummlbergerstr. 7	76674	Mallbergdorf	07583 95933			Sports Club	
1.04.15	Schwernberger, Sepp	Hoher Meiler 6	75883	Polstdorf	07563 983498	0151 78 57 38 22	schwernberger.sepp@hotmail.com	Sports Club	Sohn M Tauche
1.04.15	Stromberg, Martin	Hauptstr. 19	58435	Wennhausen - Oberdorf	07942 65463	0171 894 88 48	stromspitze@hotmail.com	Sports Club	

DOC N function.

- ▶ document handling
 - ▶ access to folder
 - ▶ standard filing structure
 - ▶ unlimited file storage
 - ▶ access to category folder

EFS 4.2 - Member List

[b] => Access Files [w] Copy File to Category Folder => Category Folder Cate []

[] < DirectFile both Folders

ZIP	Location	Tel	Mobile	
77442	Bleichdorf	07854 847		hans-bergman
58435	Wennhausen - Oberdorf	07942 65463	0171 894 88 48	stromspil
8a 79976	Freitalberg	07944 853773	0151 44 94 48 34	posaune
			2 756 84 22	beckcher

ren ▼ In Bibliothek aufnehmen ▼ Freigeben für ▼ Brennen

iten

thecken

puter

tem (C:)

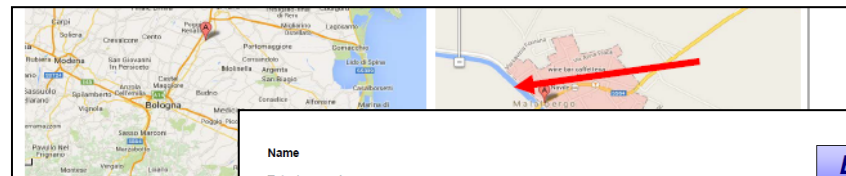
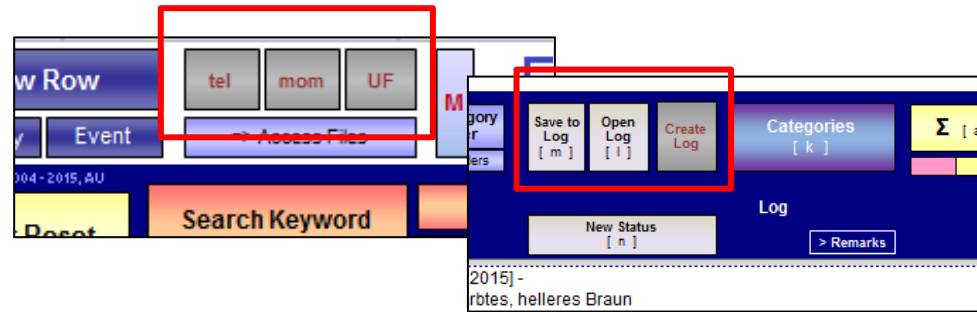
a (E:)

Name

- records mp3 from Paul-Günther
- _T Michels -- Paul-Günther.pdf
- _T Michels -- Paul-Günther.xls
- Posaune - Bruckner.docx

DOC N function.

- ▶ special documents
 - ▶ DirectFile
 - ▶ TopicFile
 - ▶ LogBookFile
- ▶ forms
 - ▶ TelephoneNote
 - ▶ Memo
 - ▶ UserForm



Project status - latest news

[27.04.2015] - meeting for contra

[02.04.2015] - techn. meeting in

[25.03.2015] - Order confirmation

[23.03.2015] - V.Petrucchio - verbal

[12.03.2015] - R.K. - asks for as

Name

Telephone note

XYZ

1501xx, tel.

-	XXXX
-	XXXX
-	XXXX
-	XXXX
-	XXXX
-	XXXX
-	XXXX
-	XXXX
-	XXXX
-	XXXX

Name

Memo: Meeting XXXX | xx.xx.2015

Memo: Meeting XXXX | xx.xx.2015

Agenda: XXXX

Location, Date: XXXX, Germany, xx.xx.2015

Participants: XXXX Mr. XXXX
XXXX Mr. XXXX

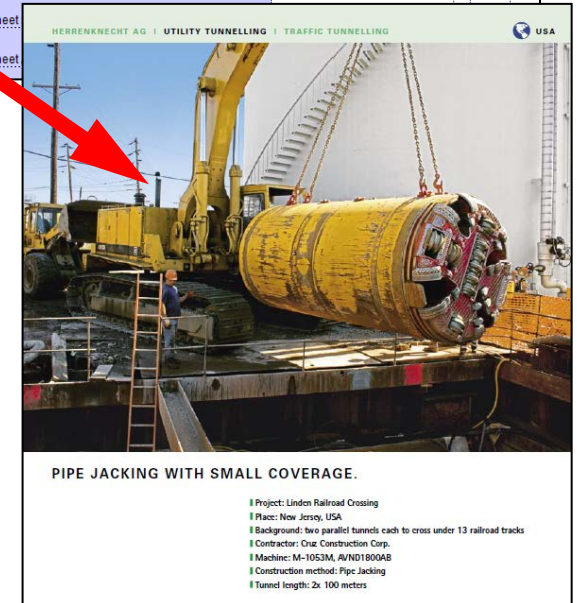
-	XXXX	
-	XXXX	
-	XXXX	
-	XXXX	
-	XXXX	
-	XXXX	
-	XXXX	

DirectFile function.

- ▶ immediate opening of target file
- ▶ file name related to entry
- ▶ file format can be defined
- ▶ no need to open folder structure
- ▶ „QuickView“ function

03.15	131122_REF_M-1469M-M-1471M_AVND2500_Hyflux_Algeria	Reference Sheet AVND2500 Hyflux, Algeria	ppt-version	AVN(D)	PJ
03.15	130821_REF_M-1103M_AVND2000_Sochi_Outfall_Russia	Reference Sheet Sea Outfall Sotschi AVND2000	ppt-version	AVN(D)	PJ
03.15	131122_REF_M-241M_AVND1600_Aspem Collector_Austria	Reference Sheet AVN1600 Österreich	ppt-version	AVN(D)	PJ
03.15	070803_REF_Sewer Liege_AVND2000AB	Reference Sheet AVND2000AB Liège Long Drive Belgien		AVN(D)	PJ
03.15	090108_REF_Portland USA_AVND2000	Reference Sheet AVND2000 Long Drive Portland USA		AVN(D)	PJ
03.15	070803_REF_Linden USA_AVND1800	Reference Sheet Railway Crossing USA AVND1800		AVN(D)	PJ
03.15	051011_REF_AVND2440_China	Reference Sheet			
03.15	051011_REF_M-678M_AVND2400_Seoul	Reference Sheet			

*.pdf



The screenshot shows the EFS software interface. At the top, there are buttons for 'Access Files', 'copy File to Category Folder', and 'Category Folder'. Below these is a table with columns: Titel, Inhalt, Länge, Genre, Dat., and C | Autor. The table lists several files, including 'Der Mann mit der Narbe', 'Der Klub der Rothaarigen', 'Ein Fall von Identität', and 'Hinter blinden Fenstern'. A red arrow points from the 'Der Klub der Rothaarigen' entry to a video player window. The video player shows a video titled 'Andreas Ulkan - Der Klub der Rothaarigen' with a duration of 0:00:02 / 0:00:05. Below the video player is a text box with the file format '*.mp3'.

LogBook function.

- ▶ fully included multiple LogBooks
- ▶ easy maintenance in EFS sheet
- ▶ LogBooks automatically filled
- ▶ LogBooks pre-defined print out
- ▶ direct access to LogBook

EFS 4.2 - Rental Equipment

Search Keyword [f] add. Keyword [b] => Access Files [w] Copy File to Category Folder [c] DirectFile [d]

in Column [e] < >

Topics Content

> Open ToDo [i]

Category	Equipment	Log	Year	Weight (t)	Width (m)	Price / d (day)	Price / d (week)	Price / d (month)
CATEGORY - Excavators								
Bobcat E20 - blue	crawler, cabin version	[17.04.2015] - rented out to Palmbach & sons, Wonburg	2008	2	0,98	Excavators	L S	118
Liebherr A910 compact	wheel excavator, middle size	[29.04.2015] - came back from repair - everything fine.	2013	12,5	2,6	Excavators	L S	198



Year	Weight (t)	Width (m)	€ / d (day)	€ / d (week)	€ / d (month)
2013	12,5	2,6	198	175	143

Log Book

[29.04.2015] - came back from repair - everything fine.

[25.04.2015] - moved to repair (Liebherr workshop)

[21.04.2015] - came back > damage at cabin glass crack)

[28.03.2015] - rented out to Palmbach & sons, Wonburg. #2

[16.02.2015] - came back from Willand. Condition ok.

[26.01.2015] - rented out to Comp. Willand & Co, Empirebach #1

wiki

ToDo-List function.

- ▶ pre-defined ToDo-List
- ▶ status handling
- ▶ searching, sorting, grouping
- ▶ filtering unfinished tasks
- ▶ pre-defined print out

No	Date	Tasks	Add.	Content
9	30.04.15	ToDo: offer check with project manager		Offer version t.b. checked upfro customer
8	30.04.15	ToDo: drawings for functional test		refer to sketch from customer.
7	30.04.15	ToDo: check prices with procurement dpt.		especially special hydraulic cyl
6	30.04.15	Done: design of functional test	[ok, 150430]	with customer! -> agreement

New Row

tel

mom

UF

M

EFS 4.2 - Customer Project

Prio-Filter

Test-Procedure

sorted: column "CAT"

Project

EFS v4.2, (c) 2004-2015, AU

Filter Reset

Search Keyword [f]

add. Keyword [b]

=> Access Files [w]

Copy File to Category Folder

=> Category Folder

Categories [k]

Σ [a]

A Z

Categories

Events

no C no E

print

S

in Column [e]

DirectFile

both Folders

No

Date

Tasks

Add.

Content

Remarks

with

till

CAT

F

X

A

Close ToDo

LOG

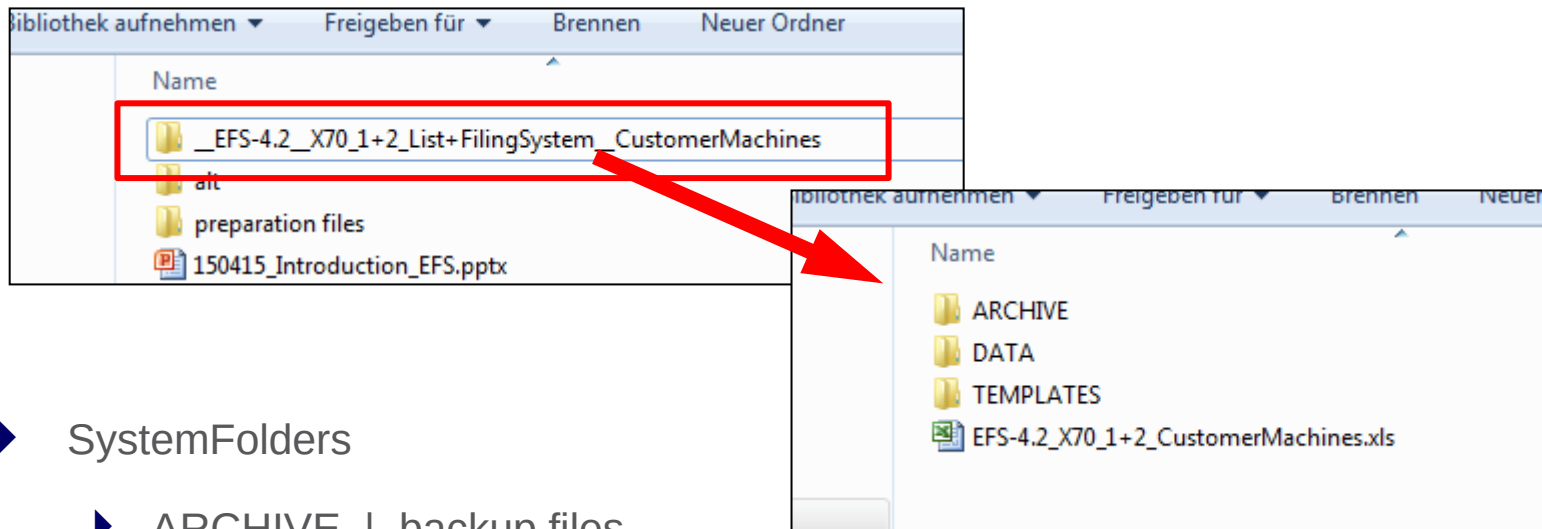
Create / Update

Open TopicFile

5	30.04.15			CATEGORY - Test-Procedure		C		Test-Procedure		
11	30.04.15	ToDo:		Test documentation equipment	camera, video,	check support by R&D dept.	Stefan	01.06.2015	Test-Procedure	X
10	30.04.15	Done:		define test scenario equipment	[ok, 150430] mechanical preparation, test material,	already talked to Stefan. Should work. [30.04.2015]	Stefan	20.05.2015	Test-Procedure	X
8	30.04.15	ToDo:		drawings for functional test	refer to sketch from customer, e-mail dd. 17.04.2015	discussed e-mail w/Michael [28.04.2015]	Michael	12.05.2015	Test-Procedure	X
6	30.04.15	Done:		design of functional test	[ok, 150430] with customer! -> agreement upfront needed!				Test-Procedure	X

File Structure.

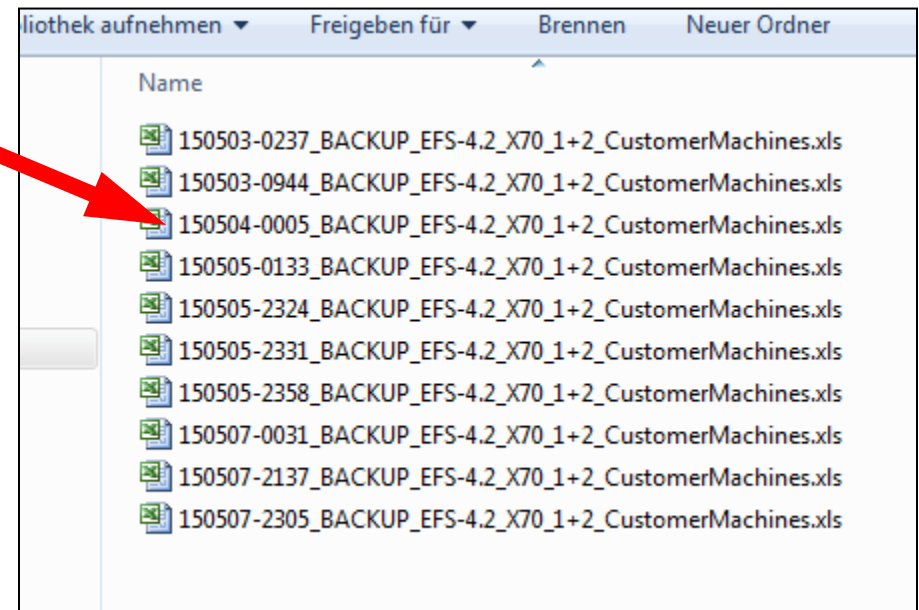
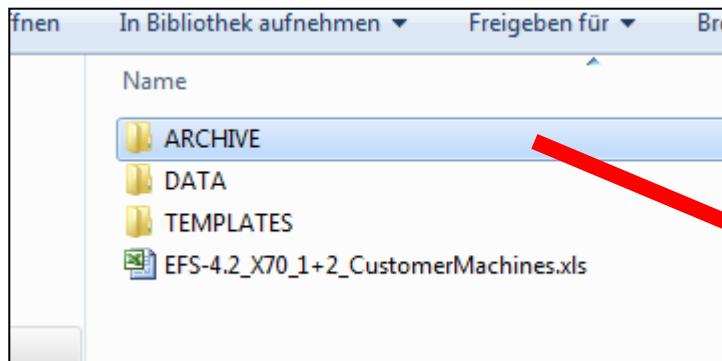
- ▶ each EFS: „closed world“ | movable
- ▶ major folder | folder structure



- ▶ SystemFolders
 - ▶ ARCHIVE | backup files
 - ▶ DATA | EFS file storage
 - ▶ TEMPLATES | EFS file templates (e.g. LogBook file)

Backup function.

- ▶ automatic backup | each EFS file closing
- ▶ defined backup storage inside file structure



- ▶ advantage: safety in case of need
- ▶ disadvantage: memory consumption

Agenda.

- ▶ Introduction & Key Elements
- ▶ **The List**
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- ▶ Don'ts
- ▶ Examples

The List | Example 1 – Customer Machines.

- ▶ many customers,
many many machines...



A - Company



B - Company



C - Company

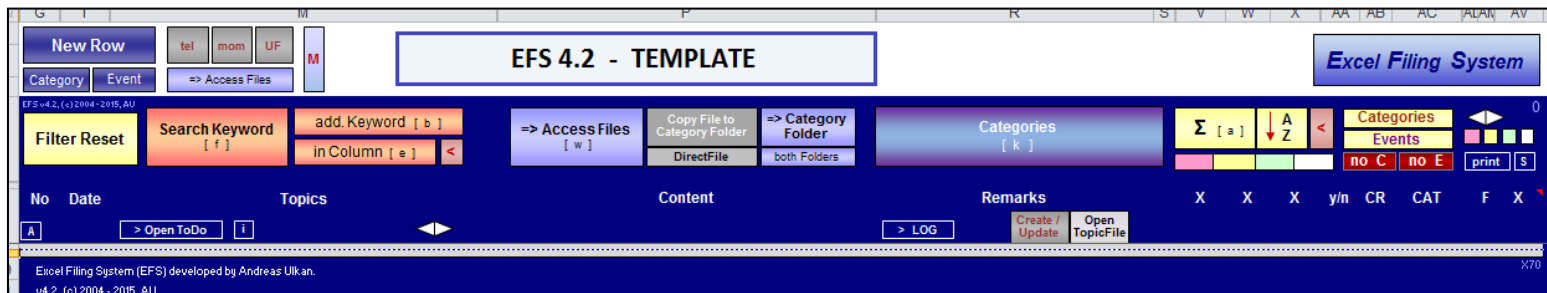


D - Company

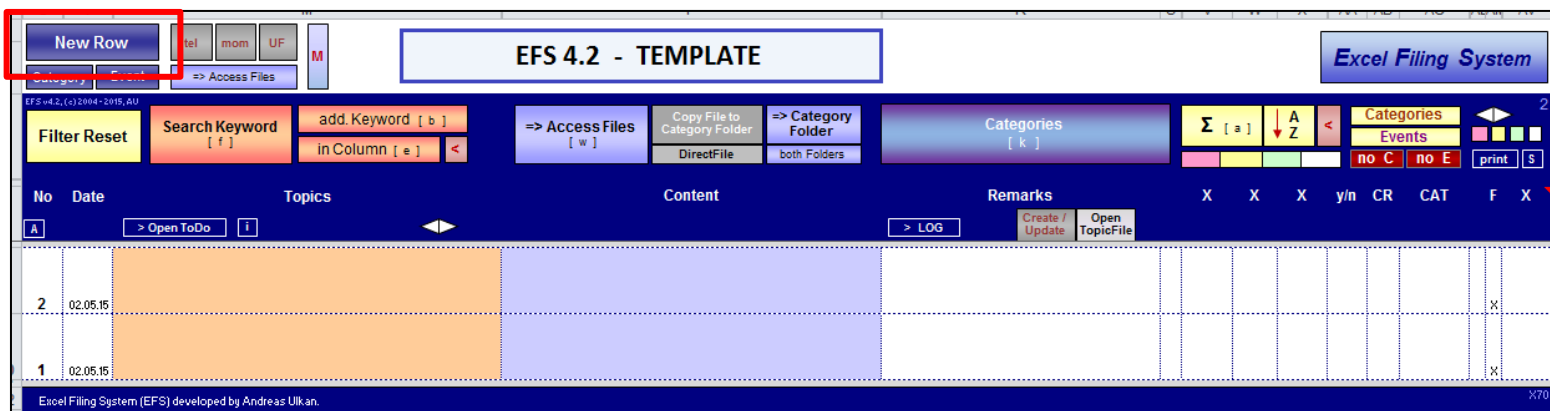


The List | Start Situation.

- ▶ open new EFS file



- ▶ 2x Button “New Row”



The List | First Steps.

- change title, column width, column headers, insert some data

Excel Filing System (EFS) v4.2, (c) 2004 - 2015, AU

Customer Machines

Excel Filing System

Filter Reset Search Keyword [f] add Keyword [b] in Column [a] => Access Files [w] Copy File to Category Folder DirectFile => Category Folder both Folders Categories [k] Σ [a] A Z Categories Events no C no E print S

No	Date	S	Machine	Techn. Description	Remarks	PM	PY	dwg	ON	CAT	F	C
2	10.05.15	(A)	ProjectNo-691M	AAS1500TB-1810PR-047132 / X-A-T-P-150-145 E-B-1500-1810-1600-1970 / R-A-T	> with ProjectNo-692C > also Ext. OD2425	Salto, Peter	2000	2973-	100720		X	IT
1	10.05.15	(A)	ProjectNo-061	R250T - 100 - 90 - stand alone - 1 - 400 - 7 - 15	> Rig quite regularly in operation	Licher, Michael	2007	3756-	101432		X	IT

Excel Filing System (EFS) developed by Andreas Ulkan.
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e-mail
About EFS

The List | First Steps.

- ▶ general view – chronological order

Customer Machines														
Excel Filing System														
Filter Reset Search Keyword [f] add Keyword [b] => Access Files [w] Copy File to Category Folder => Category Folder Categories [k] Σ [a] A Z Categories Events no C no E print S														
no	Date	S	Machine	Techn. Description	Remarks	PM	PY	dwg	ON	CAT	F	C		
15	0.05.15	(A)	ProjectNo-1370C	CC04 - T450 - P000 - H23 - HHHH	> for ProjectNo-1369M	Edelpatt, Joachim	2008	3233-		C-Company	o	F	IT	
14	0.05.15	(A)	ProjectNo-1369M	AASD2000AB-2525PR-078315 / M-A-T-P-200-250	> with ProjectNo-1370C	Edelpatt, Joachim	2008	3225-		C-Company	o	F	IT	
13	0.05.15	(A)	ProjectNo-045	R250T - 100 - 90 - stand alone - 1 - 400 - 7 - 15		Licher, Michael	2005	3599-	101368	D-Company		F	IT	
12	0.05.15	(A)	ProjectNo-913M	EPB2400TB-2825PN-055250 / M-A-T-P-400-200		Mupper, Andreas	2003	3416-	101060	E-Company		F	DE	
11	0.05.15	(A)	CATEGORY - E-Company			C				E-Company				
10	0.05.15	(A)	ProjectNo-850M	AAS800XC-1110PR-009075 / R-X-X-X-100-145, meist mit ProjectNo-304C + E-B-800-1110-1200-1505 / S-X-X		Belder, Michael	2002	3219-	100859	D-Company	X		IT	
9	0.05.15	(A)	ProjectNo-1109C	CC03 - T250 - P000 - H15 - FFXF		Belder, Michael	2005	3678-	101516	D-Company	X		IT	
8	0.05.15	(A)	ProjectNo-1110M	AAS1600TB-1970PR-047160 / M-X-T-P-150-170		Belder, Michael	2005	3666-	101515	D-Company	X		IT	

The List | First Steps.

- ▶ sorting | customized sort columns 1 & 2

Customer Machines														
Excel Filing System														
No	Date	S	Machine	Techn. Description	Remarks	PM	PY	dwg	ON	CAT	F	C		
11	10.05.15	(A)	CATEGORY - E-Company	AAS800XC-1110PR-009075 / R-X-X-X-100-145, meist mit ProjectNo-304C						E-Company				
10	10.05.15	(A)	ProjectNo-850M	+ E-B-800-1110-1200-1505 / S-X-X		Belder, Michael	2002	3219-	100859	D-Company	X	IT		
9	10.05.15	(A)	ProjectNo-1109C	CC03 - T250 - P000 - H15 - FFXF		Belder, Michael	2005	3678-	101516	D-Company	X	IT		
8	10.05.15	(A)	ProjectNo-1110M	AAS1600TB-1970PR-047160 / M-X-T-P-150-170		Belder, Michael	2005	3666-	101515	D-Company	X	IT		

ProjectNo-691M	AAS1500TB-1810PR-047132 / X-A-T-P-150-145 E-B-1500-1810-1600-1970 / R-A-T	> with ProjectNo-692C > also Ext. OD2425	Salto, Peter	2000	2973-	100720	C-Company
ProjectNo-692C	CC04-T270-P000-H15-EHHF	> for ProjectNo-691M	Salto, Peter	2000	2973-	100721	C-Company
CATEGORY - D-Company			C				D-Company
ProjectNo-045	R250T - 100 - 90 - stand alone - 1 - 400 - 7 - 15		Licher, Michael	2005	3593-	101366	D-Company
ProjectNo-1109C	CC03 - T250 - P000 - H15 - FFXF		Belder, Michael	2005	3678-	101516	D-Company

The List | First Steps.

► new category

The screenshot displays the 'Excel Filing System' interface. At the top, there's a 'Customer Machines' title bar. Below it, a toolbar includes buttons for 'New Row', 'Category', 'Event', 'Access Files', 'Filter Reset', 'Search Keyword', 'add. Keyword', 'in Column', 'Access Files', 'Copy File to Category Folder', 'Category Folder', 'Categories', 'Σ', 'A-Z', 'no C', 'no E', 'print', and 'S'. A red box highlights the 'Category' button. A 'Microsoft Excel' dialog box is open in the center, prompting 'Please enter the CATEGORY NAME:' with the text 'F-Company' entered. The background shows a table with columns: No, Date, S, Machine, Techn., and various data fields. The table contains several rows of data, including project numbers and company names like 'C-Company' and 'B-Company'.

No	Date	S	Machine	Techn.															
22	04.06.15	(A)																	
21	10.05.15	(A)	ProjectNo-619C	CC04 - T350 - P000 - H23 - FHXH	> for ProjectNo-618M														
20	10.05.15	(H)	ProjectNo-618M	AA5D2000AB-2420PR-078250 / S-A-T-P-200-200- + E-B-2000-2400-2500-3000 / S-A-X	> with ProjectNo-619C > also Ext. OD3300 > Mach. damaged heavily! - No refurb.														
19	10.05.15	(A)	CATEGORY - B-Company																
18	10.05.15	(A)	EVENT - Thomas Brell	very good relationship between Thomas and C-Company															
17	10.05.15	(A)	ProjectNo-1224M	AA5D1800AB-2145PR-052160 / M-A-T-P-150-160															
16	10.05.15	(A)	ProjectNo-692C	CC04-T270-P000-H15-EHHF	> for ProjectNo-691M														

The List | Categories.

► category window | insert category

The screenshot shows the 'Excel Filing System' interface with a modal dialog titled 'Actually listed categories'. The dialog contains a table of categories and their counts:

Category	#
A-Company	3
B-Company	19
C-Company	4
D-Company	7
E-Company	11
F-Company	22

On the left side of the dialog, there are two buttons: 'insert category' (highlighted with a red box) and 'access files directly'. At the bottom are 'cancel' and 'summarize category' buttons. A red arrow points from the 'insert category' button to the 'C-Company' entry in the background table.

The background table has columns: No, Date, S, Machine, and a list of project entries. The 'C-Company' entry is highlighted in red in the original image.

The List | Categories.

- category window | summarizing filter

The screenshot displays the Excel Filing System (EFS) interface. A dialog box titled 'Actually listed categories' is open, showing a list of categories and their counts. The categories are A-Company (3), B-Company (19), C-Company (4), D-Company (7), E-Company (11), and F-Company (22). The 'D-Company' row is highlighted. A red arrow points to the 'insert category' button on the left side of the dialog. A red box highlights the 'summarize category' button at the bottom right of the dialog. The background shows a table with columns 'No', 'Date', 'S', and 'Machine'. The table contains data for various projects, including ProjectNo-913M, ProjectNo-850M, ProjectNo-1110M, ProjectNo-684C, and ProjectNo-683M. The status bar at the bottom indicates the current file is 'AASD2000AB-2520PR-078250 / R-A-T-P-200-200' and 'E-B-2000-2500-2500-3000 / R-A-T'.

Category	#
A-Company	3
B-Company	19
C-Company	4
D-Company	7
E-Company	11
F-Company	22

The List | Filter View. (1/2)

- Prio-Filter, e.g. by category | here: customer machines – filtered and sorted

The screenshot displays the 'Excel Filing System' interface. At the top, there's a 'Prio-Filter' section with 'D-Company' selected and 'sorted: column "CAT"'. Below this, a toolbar contains buttons for 'Filter Reset', 'Search Keyword', 'add. Keyword', 'in Column', 'Access Files', 'Copy File to Category Folder', 'Category Folder', 'DirectFile', and 'both Folders'. The main table has columns: No, Date, Machine, Techn. Description, Remarks, PM, PY, dwg, ON, CAT, F, and C. The table is filtered to show only 'D-Company' entries. The first row is a header row with a blue background. The subsequent rows are data rows with alternating orange and light blue backgrounds. The 'Machine' column contains project names like 'ProjectNo-045', 'ProjectNo-1109C', 'ProjectNo-1110M', and 'ProjectNo-850M'. The 'Techn. Description' column contains technical specifications. The 'Remarks' column contains names like 'Licher, Michael' and 'Belder, Michael'. The 'CAT' column contains the value 'D-Company'.

No	Date	Machine	Techn. Description	Remarks	PM	PY	dwg	ON	CAT	F	C
7	10.05.15	(A) CATEGORY - D-Company							D-Company		
13	10.05.15	(A) ProjectNo-045	R250T - 100 - 90 - stand alone - 1 - 400 - 7 - 15		Licher, Michael	2005	3599-	101366	D-Company	F	IT
9	10.05.15	(A) ProjectNo-1109C	CC03 - T250 - P000 - H15 - FFXF		Belder, Michael	2005	3678-	101516	D-Company	X	IT
8	10.05.15	(A) ProjectNo-1110M	AAS1600TB-1970PR-047160 / M-X-T-P-150-170		Belder, Michael	2005	3666-	101515	D-Company	X	IT
10	10.05.15	(A) ProjectNo-850M	AAS800XC-1110PR-009075 / R-X-X-X-100-145, meist mit ProjectNo-304C + E-B-800-1110-1200-1505 / S-X-X		Belder, Michael	2002	3219-	100859	D-Company	X	IT

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The List | Filter View. (2/2)

- „Search 4“ function | here: two search levels, sorted

Filter: ***D-Company* + *1600***
sorted: column "CAT"

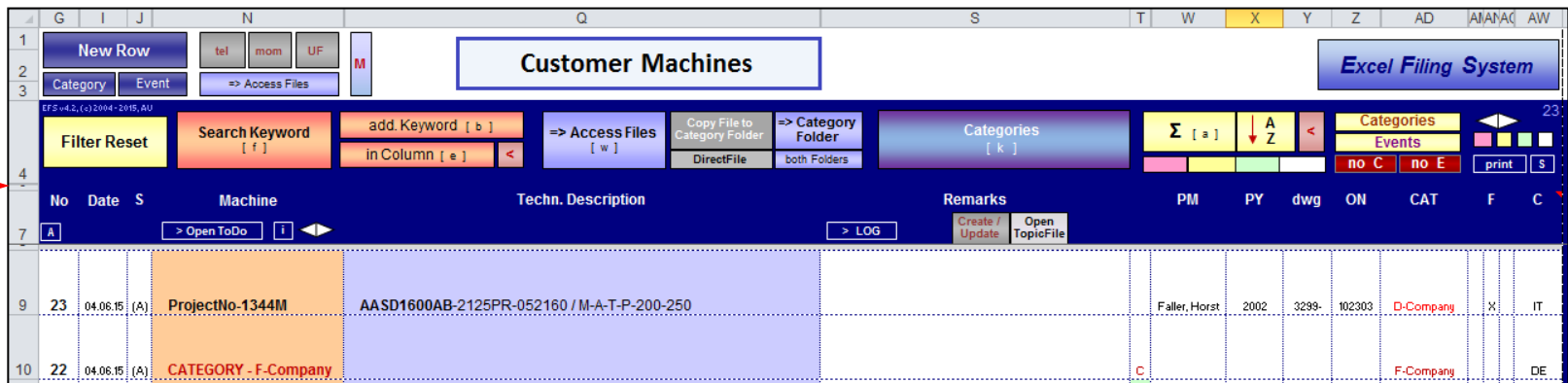
No	Date	S	Machine	Techn. Description	Remarks	PM	PY	dwg	ON	CAT	F	C
8	10.05.15	(A)	ProjectNo-1110M	AAS1600TB-1970PR-047160 / M-X-T-P-150-170		Belder, Michael	2005	3666-	101515	D-Company	X	IT
23	04.06.15	(A)	ProjectNo-1344M	AASD1600AB-2125PR-052160 / M-A-T-P-200-250		Faller, Horst	2002	3299-	102303	D-Company	X	

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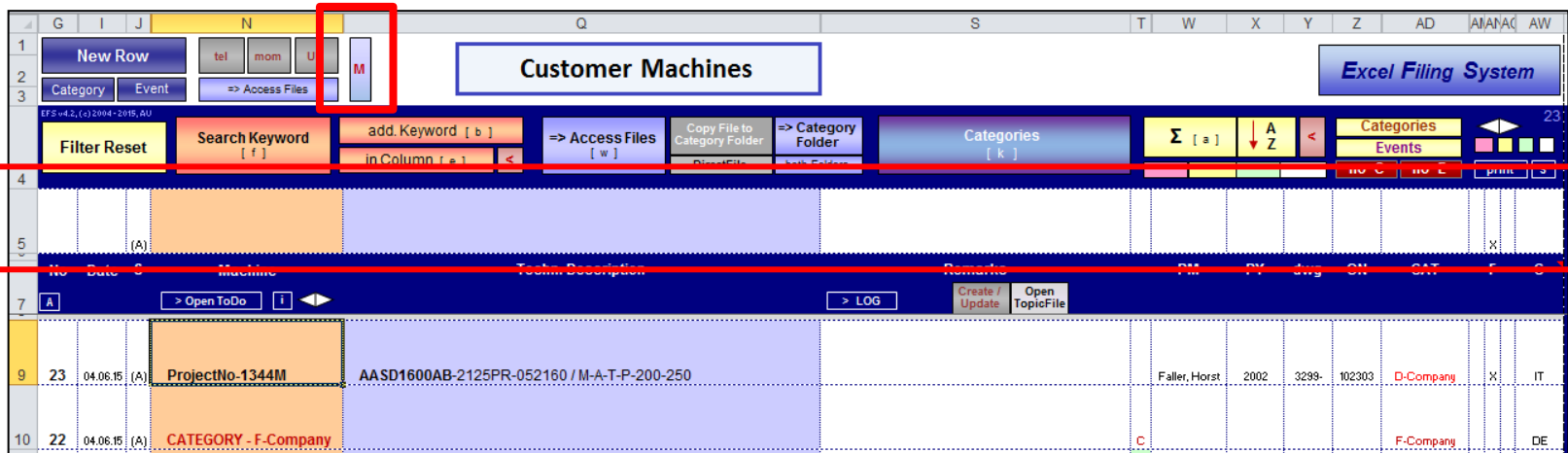
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[About EFS](#)

The List | Helpful Improvements | MasterRow.

- ▶ hidden „MasterRow“ | open & close: button „M“ | customizing format



No	Date	S	Machine	Techn. Description	Remarks	PM	PY	dwg	ON	CAT	F	C
23	04.06.15	(A)	ProjectNo-1344M	AASD1600AB-2125PR-052160 / M-A-T-P-200-250		Faller, Horst	2002	3299-	102303	D-Company	X	IT
22	04.06.15	(A)	CATEGORY - F-Company							F-Company		DE



No	Date	S	Machine	Techn. Description	Remarks	PM	PY	dwg	ON	CAT	F	C
23	04.06.15	(A)	ProjectNo-1344M	AASD1600AB-2125PR-052160 / M-A-T-P-200-250		Faller, Horst	2002	3299-	102303	D-Company	X	IT
22	04.06.15	(A)	CATEGORY - F-Company							F-Company		DE

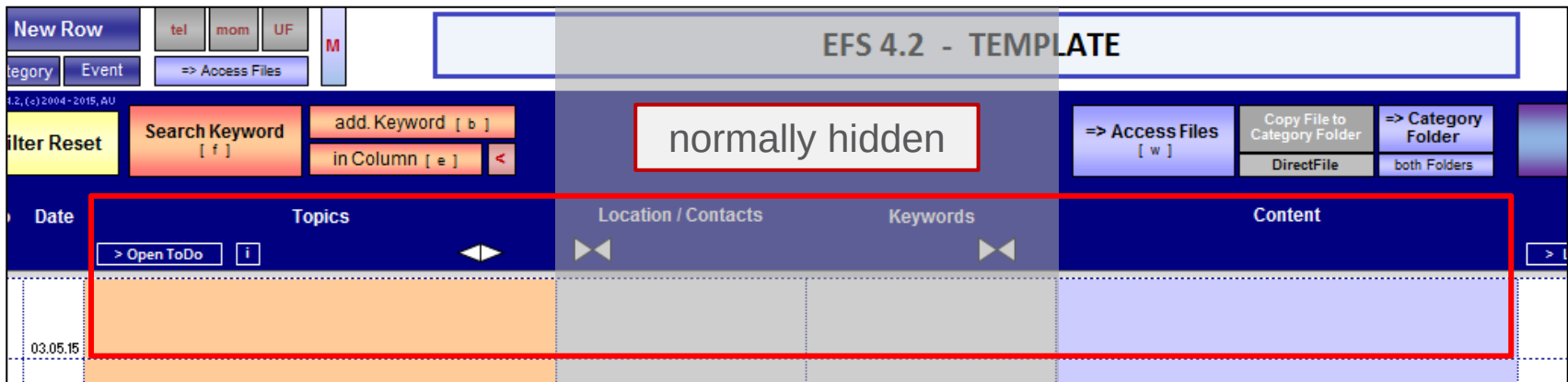
The List | Helpful Improvements | Events.

- special entries | for extra-ordinary contents

Customer Machines													
C-Company + (A)													
sorted: column "CAT"													
No	Date	S	Machine	Techn. Description	Remarks	PM	PY	dwg	ON	CAT	F	C	
18	10.05.15	(A)	EVENT - Thomas Brell	very good relationship between Thomas and C-Company						C-Company	X		
17	10.05.15	(A)	ProjectNo-1224M	AASD1800AB-2145PR-052160 / M-A-T-P-150-160		Belder, Michael	2007	3922-		C-Company	c	F	IT
14	10.05.15	(A)	ProjectNo-1369M	AASD2000AB-2525PR-078315 / M-A-T-P-200-250	> with ProjectNo-1370C	Edelpatt, Joachim	2008	3225-		C-Company	c	F	IT
15	10.05.15	(A)	ProjectNo-1370C	CC04 - T450 - P000 - H23 - HHHH	> for ProjectNo-1369M	Edelpatt, Joachim	2008	3233-		C-Company	c	F	IT
21	10.05.15	(A)	ProjectNo-619C	CC04 - T350 - P000 - H23 - FHXX	> for ProjectNo-618M		1999	2866-	100460	C-Company	X		IT
5	10.05.15	(A)	ProjectNo-683M	AASD2000AB-2520PR-078250 / R-A-T-P-200-200 E-B-2000-2500-2500-3000 / R-A-T	> with ProjectNo-684C > also Ext. OD3000		2000	2960-	100569	C-Company	c	X	IT
6	10.05.15	(A)	ProjectNo-684C	CC04 - T350 - P000 - H23 - FHXX	> for ProjectNo-683M		2000	2961-	100569	C-Company	X		IT

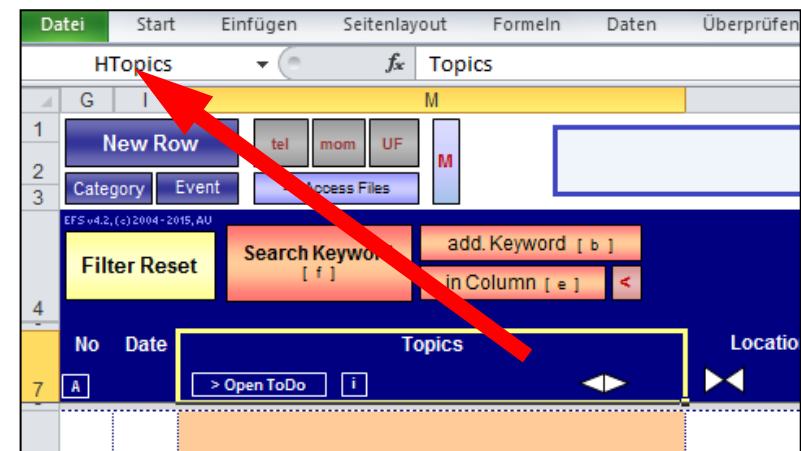
The List | Helpful Improvements | Search Columns. (1/2)

- ▶ pre-defined EFS search columns | incl. two hidden search columns



- ▶ definition of column header names

- ▶ HTopics
- ▶ HLocPart
- ▶ HKeywords
- ▶ HContent



The List | Helpful Improvements | Search Columns. (2/2)

- ▶ customized search column („fifth search column“)

The screenshot displays the EFS 4.2 interface with a Microsoft Excel dialog box open. The dialog box, titled "Microsoft Excel", shows the "Search Columns" configuration. It lists "Search Columns: 'Topics', 'Location / Contacts', 'Keywords', 'Content'" and "FIFTH SEARCH COLUMN: 'further Infos'". An "OK" button is at the bottom right. A red arrow points from the "Fifth SearchColumn" dropdown in the "SortBySearch" section to the "further Infos" column header in the Excel spreadsheet below. The spreadsheet shows a table with columns "No", "Date", "Topics", "Content", and "Remarks". A red box labeled "EFS 4.2 - TEMPLATE" is overlaid on the spreadsheet. A red box labeled "sheet „settings“" points to the "SortBySearch" section. A red box labeled "sheet „EFS 4.2“" points to the spreadsheet area.

SortBySearch
No

Search Columns & Display

Fifth SearchColumn
HDetails01

FilterInfoColumn
HEvaluation

OpenHiddenColumns
Yes

actualsearch columns

Microsoft Excel

Search Columns

Search Columns: "Topics", "Location / Contacts", "Keywords", "Content"

FIFTH SEARCH COLUMN: "further Infos"

OK

sheet „settings“

sheet „EFS 4.2“

EFS 4.2 - TEMPLATE

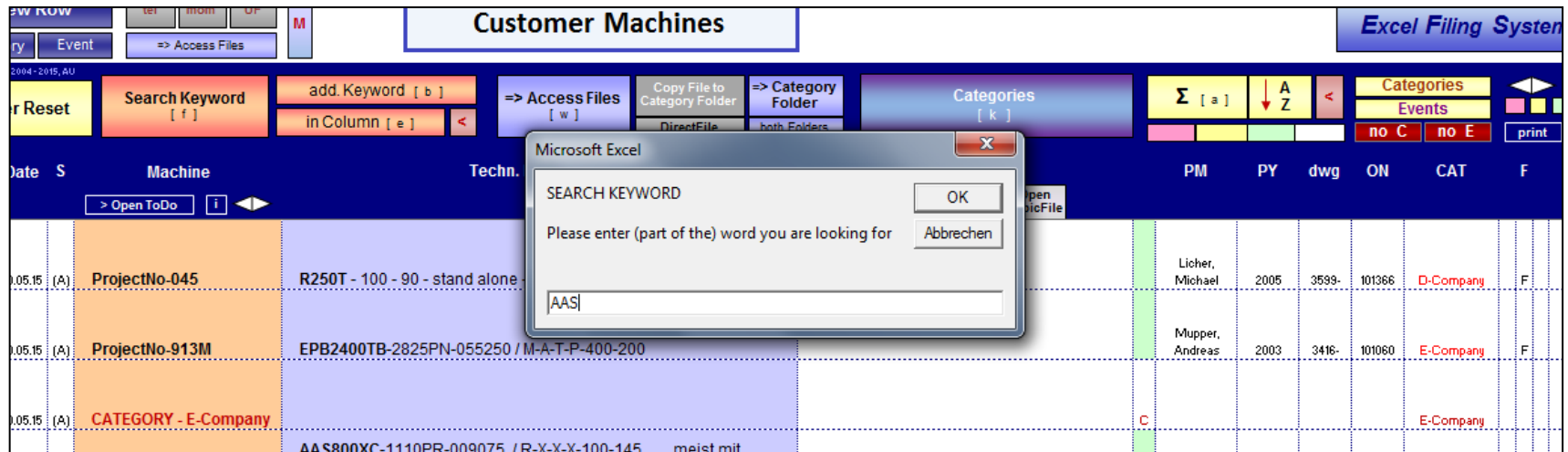
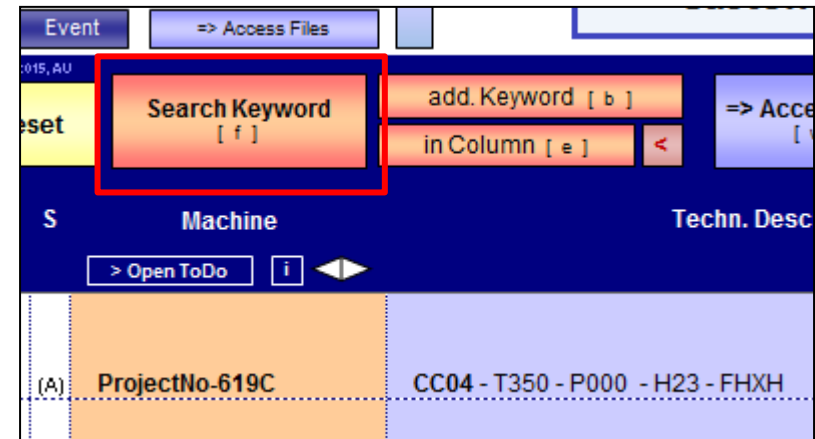
Filter Reset Search Keyword [f] add. Keyword [b] in Column [e] => Access Files [w] Copy Category Folder DirectFile => Category Folder both Folders Categories [k] Σ [a] further Infos X

No Date Topics Content Remarks

> Open ToDo > LOG Create / Update Open TopicFile

The List | Helpful Improvements | Search 4. (1/9)

- ▶ PrioSearch „Search Keyword“
 - ▶ Strg + f
 - ▶ search in Search Columns only



The List | Helpful Improvements | Search 4. (2/9)

- search result | number of results | filter info

Customer Machines													
Excel Filing System													
Prio-Filter *aas* Filter: column "CAT"													
Categories [k]													
Σ [a] A Z													
Categories Events no C no E print													
No	Date	Machine	Techn. Description	Remarks	PM	PY	dwg	ON	CAT	F	C		
17	10.05.15	ProjectNo-1224M	AASD1800AB-2145PR-052160 / M-A-T-P-150-160		Belder, Michael	2007	3922-		C-Company	o	F	IT	
14	10.05.15	ProjectNo-1369M	AASD2000AB-2525PR-078315 / M-A-T-P-200-250	> with ProjectNo-1370C	Edelpatt, Joachim	2008	3225-		C-Company	o	F	IT	
5	10.05.15	ProjectNo-683M	AASD2000AB-2520PR-078250 / R-A-T-P-200-200 E-B-2000-2500-2500-3000 / R-A-T	> with ProjectNo-684C > also Ext. OD3000		2000	2960-	100569	C-Company	o	X	IT	
2	10.05.15	ProjectNo-691M	AAS1500TB-1810PR-047132 / X-A-T-P-150-145 E-B-1500-1810-1600-1970 / R-A-T	> with ProjectNo-692C > also Ext. OD2425	Salto, Peter	2000	2973-	100720	C-Company		X	IT	
8	10.05.15	ProjectNo-1110M	AAS1600TB-1970PR-047160 / M-X-T-P-150-170		Belder, Michael	2005	3666-	101515	D-Company		X	IT	
23	04.06.15	ProjectNo-1344M	AASD1600AB-2125PR-052160 / M-A-T-P-200-250		Faller, Horst	2002	3299-	102303	D-Company		X	IT	
10	10.05.15	ProjectNo-850M	AAS800XC-1110PR-009075 / R-X-X-X-100-145, meist mit ProjectNo-304C E-B-800-1110-1200-1505 / S-X-X		Belder, Michael	2002	3219-	100859	D-Company		X	IT	

New Row

telmomUF

M

Customer Machines

Filter: *AAS* + *C-Company*
orted: column "CAT"

Excel Filing System

CategoryEvent=> Access Files

EF5 v4.2, (c) 2004-2015, AU

Search Keyword [f]add. Keyword [b]in Column [e]<

=> Access Files [w]

Copy File to Category FolderDirectFile

=> Category Folderboth Folders

Categories [k]

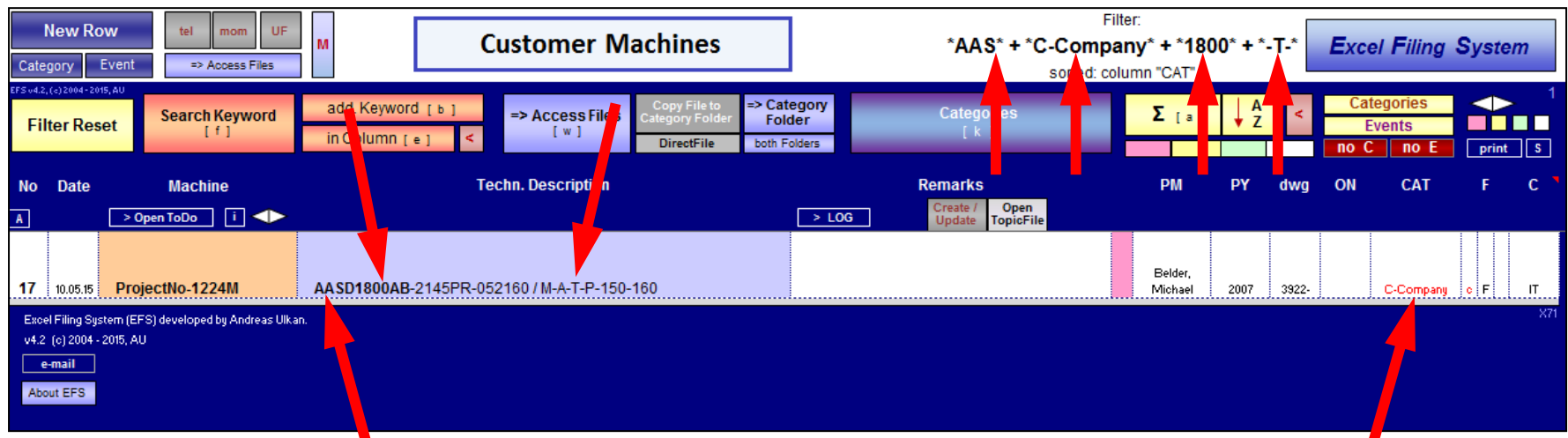
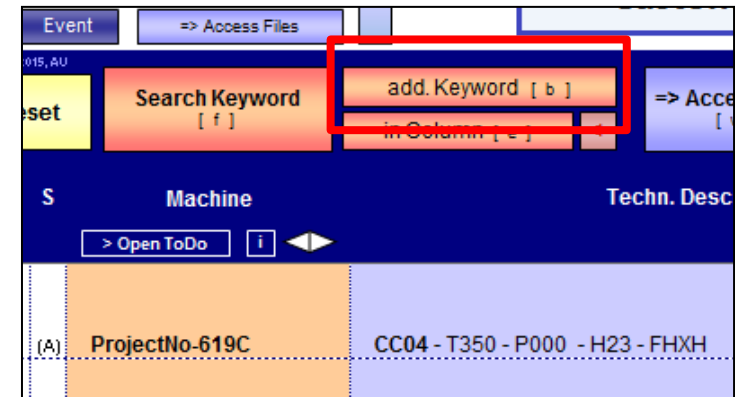
Σ [a]A Z<

CategoriesEventsno Cno EprintS

No	Date	Machine	Techn. Description	Remarks	PM	PY	dwg	ON	CAT	F	C
A		> OpenToDo	I	> LOG	Create / Update	Open TopicFile					
17	10.05.15	ProjectNo-1224M	AASD1800AB-2145PR-052160 / M-A-T-P-150-160		Belder, Michael	2007	3922-		C-Company	o	FIT
14	10.05.15	ProjectNo-1369M	AASD2000AB-2525PR-078315 / M-A-T-P-200-250	> with ProjectNo-1370C	Edelpatt, Joachim	2008	3225-		C-Company	o	FIT
20	10.05.15	ProjectNo-619M	AASD2000AB-2420PR-078250 / S-A-T-P-200-200- + E-B-2000-2400-2500-3000 / S-A-X	> with ProjectNo-619C > also Ext. OD3300 > Mach. damaged heavily! - No refurb.			1999 2908-	100459	C-Company	X	IT
5	10.05.15	ProjectNo-683M	AASD2000AB-2520PR-078250 / R-A-T-P-200-200 E-B-2000-2500-2500-3000 / R-A-T	> with ProjectNo-684C > also Ext. OD3000		2000	2960-	100569	C-Company	o	XIT
2	10.05.15	ProjectNo-691M	AAS-500TB-1810PR-047132 / X-A-T-P-150-145 E-B-2000-1810-1600-1970 / R-A-T	> with ProjectNo-692C > also Ext. OD2425	Salto, Peter	2000	2973-	100720	C-Company	X	IT

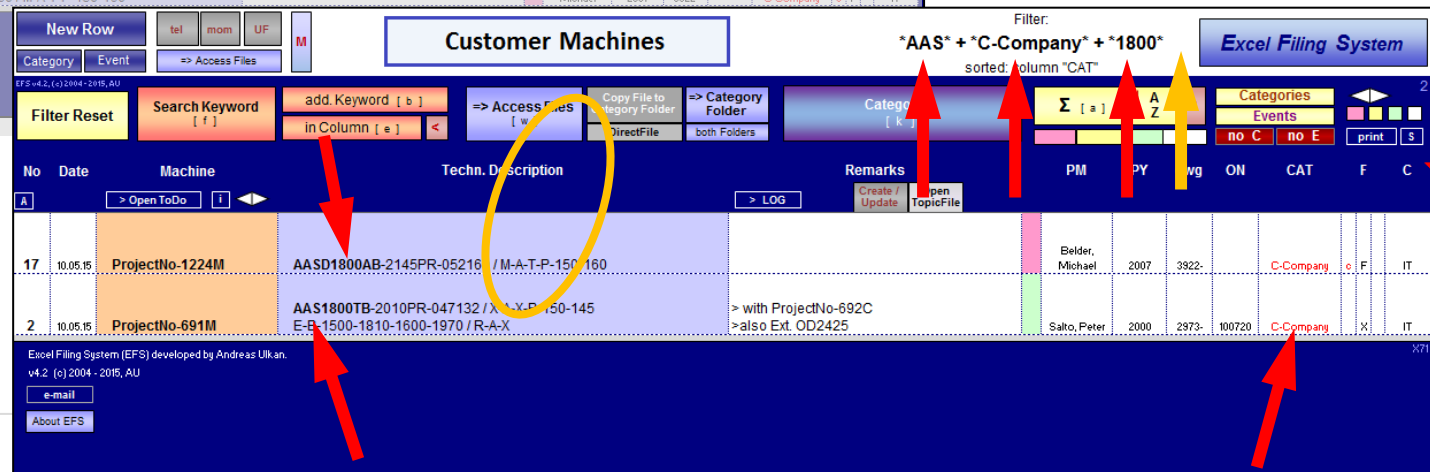
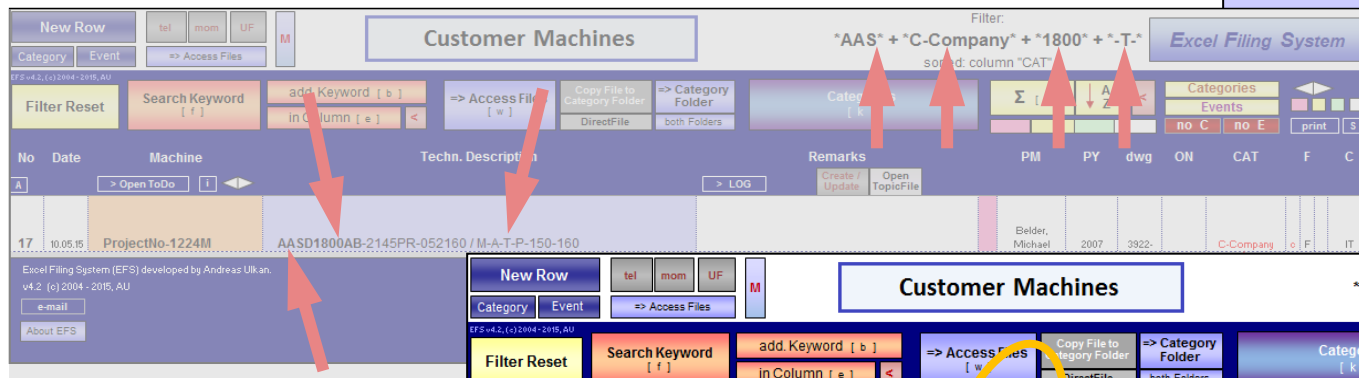
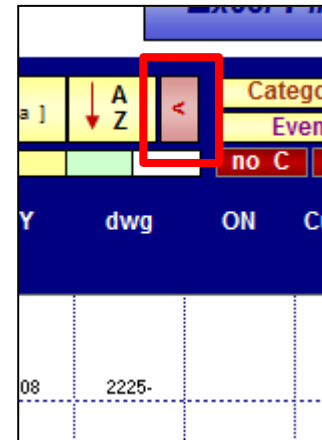
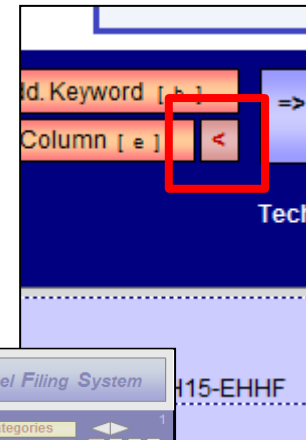
The List | Helpful Improvements | Search 4. (4/9)

- specified search
 - up to **search** level No 4
 - still: search in Search Columns only
 - each level: reduction of previous search result acc. to additional keyword



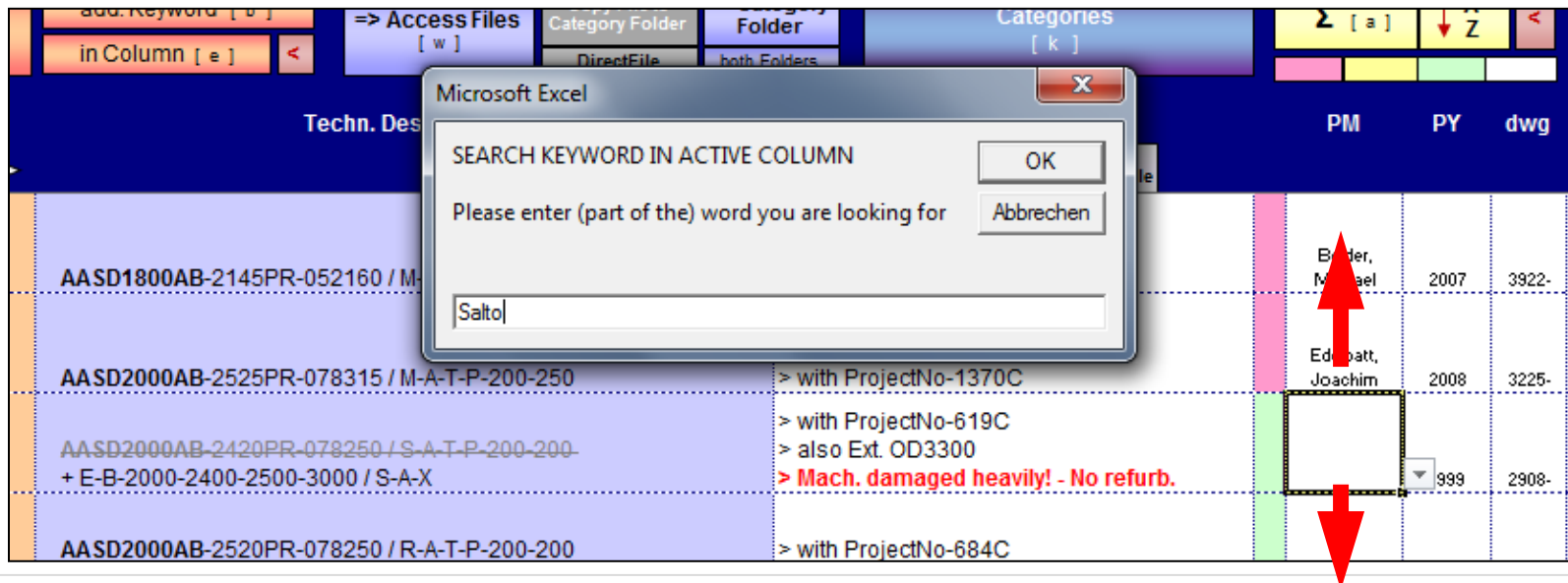
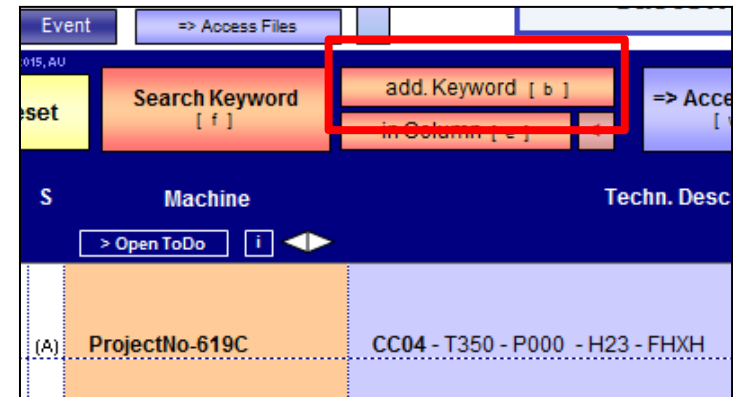
The List | Helpful Improvements | Search 4. (5/9)

- ▶ reset one search level
 - ▶ Strg + Sh + r
 - ▶ remove previous specified search level
 - ▶ = set back one level to previous search result



The List | Helpful Improvements | Search 4. (6/9)

- ▶ search „in Column“
 - ▶ search in selected column only
 - ▶ reduction of previous search result acc. to additional result in selected column



The List | Helpful Improvements | Search 4. (7/9)

- ▶ search result | incl. search „in Column“

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Buttons: New Row, tel, mom, UF, M, Category, Event, => Access Files, Filter Reset, Search Keyword [f], add. Keyword [b], in Column [e], => Access Files [w], Copy File to Category Folder, DirectFile, => Category Folder, both Folders, Category [k], Σ [a], A, Z, Categories, Events, no C, no E, print, S.

Filter: *AAS* + *C-Company* + *Salto*
sorted: column "CAT"

No	Date	Machine	Techn. Description	Remarks	PM	dwg	ON	CAT	F	C	
2	10.05.15	ProjectNo-691M	AAS1800TB-2010PR-047132 / X-A-X-P-150-145 E-B-1500-1810-1600-1970 / R-A-X	> with ProjectNo-692C >also Ext. OD2425	Salto, Peter	2000	2973-	100720	C-Company	X	IT

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Buttons: e-mail, About EFS

The List | Helpful Improvements | Search 4. (8/9)

- ▶ color code | use as additional search filter
 - ▶ filter group: color filter switchable within search level
 - ▶ reset one search level: removes color filter

Excel Filing System

Filter: sorted: column "CAT"

Categories [a] A Z <

Events no C no F print S

PM PY dwg ON CAT F C

Belder, Michael	2007	3922-	C-Company	c	F	IT
Edelpatt, Joachim	2008	3225-	C-Company	c	F	IT
	1999	2908-	100459	C-Company	X	IT

Excel Filing System

Filter: C-Company + green sorted: column "CAT"

Categories [k] Σ [a] A Z <

Events no C no E print S

PM PY dwg ON CAT F C

No	Date	Machine	Techn. Description	Remarks	PM	PY	dwg	ON	CAT	F	C
21	10.05.15	ProjectNo-619C	CC04 - T350 - B000 - U22 - FUVU	for ProjectNo-618M							
5	10.05.15	ProjectNo-683M	AASD2000 E-B-2000-	ctNo-684C DD3000							
6	10.05.15	ProjectNo-684C	CC04 - T350	ctNo-683M							
2	10.05.15	ProjectNo-691M	AAS18007 E-B-1500-	ctNo-692C DD2425							
			Belder, Michael	2007	3922-						
			Edelpatt, Joachim	2008	3233-						

The List | Helpful Improvements | AutoFilter Button.

- ▶ Excel AutoFilter | standard function
- ▶ Button „A“ | switch on / off
- ▶ pre-defined filter area (complete data list)

The screenshot displays the EFS v4.2 interface with a data table and a filter dropdown menu. The table has columns: No, Date, Machine, Techn. Description, and Remarks. The filter dropdown menu is open, showing a search field and a list of items to filter. A red box highlights the 'A' button in the table header, and a red arrow points to the search field in the filter menu.

No	Date	Machine	Techn. Description	Remarks
15	10.05.15	ProjectNo-1370C	CC04 - T450 - P000	
14	10.05.15	ProjectNo-1369M	AASD2000AB-2525	
13	10.05.15	ProjectNo-045	R250T - 100 - 90 - s	
12	10.05.15	ProjectNo-913M	EPB2400TB-2825P	
11	10.05.15	CATEGORY - E-Company	AAS800XC-1110PR ProjectNo-304C + E-B-800-1110-120	
10	10.05.15	ProjectNo-850M		
9	10.05.15	ProjectNo-1109C	CC03 - T250 - P000	

Filter dropdown menu options:

- Von A bis Z sortieren
- Von Z bis A sortieren
- Nach Farbe sortieren
- Filter löschen aus "Techn. Description"
- Nach Farbe filtern
- Textfilter
- Suchen
- ☒ (Alles auswählen)
- ☒ AAS1600TB-1970PR-047160 / M-X-T
- ☒ AAS1800TB-2010PR-047132 / X-A-X
- ☒ AAS800XC-1110PR-009075 / R-X-X
- ☒ AASD1600AB-2125PR-052160 / M-A
- ☒ AASD1800AB-2145PR-052160 / M-A
- ☒ AASD2000AB-2420PR-078250 / S-A
- ☒ AASD2000AB-2520PR-078250 / R-A
- ☒ AASD2000AB-2525PR-078315 / M-A

The List | Helpful Improvements | MultiCategories. (1/3)

- ▶ up to five categories per entry
- ▶ handling via category window

The screenshot displays the Excel Filing System interface. A window titled 'Actually listed categories' is open, showing a list of categories and their counts:

Category	#
A-Company	3
B-Company	19
C-Company	4
D-Company	7
E-Company	11
F-Company	22

A red box highlights the 'insert category' button in the 'Actually listed categories' window. A red arrow points from this button to a Microsoft Excel dialog box that says 'Further category successfully linked to this entry.' with an 'OK' button.

The background shows the main Excel Filing System window with a table of entries. The table has columns for No, Date, and Machine. The entries are as follows:

No	Date	Machine
10	10.05.15	ProjectNo-850M
9	10.05.15	ProjectNo-1109C
8	10.05.15	ProjectNo-1110M
7	10.05.15	CATEGORY - D-Company
6	10.05.15	ProjectNo-684C
5	10.05.15	ProjectNo-683M
4	10.05.15	CATEGORY - C-Company
3	10.05.15	CATEGORY - A-Company

The List | Helpful Improvements | MultiCategories. (2/3)

- ▶ selection window when summarizing entries related to category
- ▶ here: two linked categories

The screenshot displays the Excel Filing System interface. At the top, there's a header bar with 'New Row', 'tel', 'mom', 'UF', and 'M' buttons. Below this is a 'Customer Machines' title bar. The main interface includes a 'Filter Reset' button, a 'Search Keyword' field, and several action buttons like 'add. Keyword', 'in Column', 'Access Files', 'Copy File to Category Folder', and 'DirectFile'. A red box highlights a selection window with a yellow background and a downward arrow. Below this, a dialog box titled 'various categories existing' is open, showing 'Related Categories' with a table of categories and their counts. A red arrow points to 'B-Company' in the list. The background shows a table with columns 'No', 'Date', and 'Machine'.

No	Date	Machine
10	10.05.15	ProjectNo-850M
9	10.05.15	ProjectNo-1109C
8	10.05.15	ProjectNo-1110M
7	10.05.15	CATEGORY - D-Company
6	10.05.15	ProjectNo-684C
5	10.05.15	ProjectNo-683M

various categories existing

Categories related to this topic	#
D-Company	7
B-Company	19

cancel summarize category

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AASD2000AB-2520PR-078250 / R-A-T-P-200-200
E-B-2000-2500-2500-3000 / R-A-T

> with ProjectNo-684C
> also Ext. OD3000

2000 2960- 100569 C-Company o X IT

The List | Helpful Improvements | MultiCategories. (3/3)

- ▶ selection window when summarizing entries related to category

Excel Filing System (EFS) developed by Andreas Ulkan.
v4.2 (c) 2004 - 2015, AU

Buttons: e-mail, About EFS

Customer Machines

Prio-Filter: B-Company
sorted: column "CAT"

Filter Reset, Search Keyword [f], add.Keyword [b], in Column [e], => Access Files [w], Copy File to Category Folder, DirectFile, => Category Folder, both Folders, Categories [k], Σ [a], A Z, Categories, Events, no C, no E, print, S

No	Date	Machine	Techn. Description	Remarks	PM	PY	dwg	ON	CAT	F	C
19	10.05.15	CATEGORY - B-Company			C				B-Company		IT
17	10.05.15	ProjectNo-1224M	AASD1800AB-2145PR-052160 / M-A-T-P-150-160		Belder, Michael	2007	3922-		B-Company	o	F IT
8	10.05.15	ProjectNo-1110M	AAS1600TB-1970PR-047160 / M-X-T-P-150-170		Belder, Michael	2005	3666-	101515	D-Company	x	IT

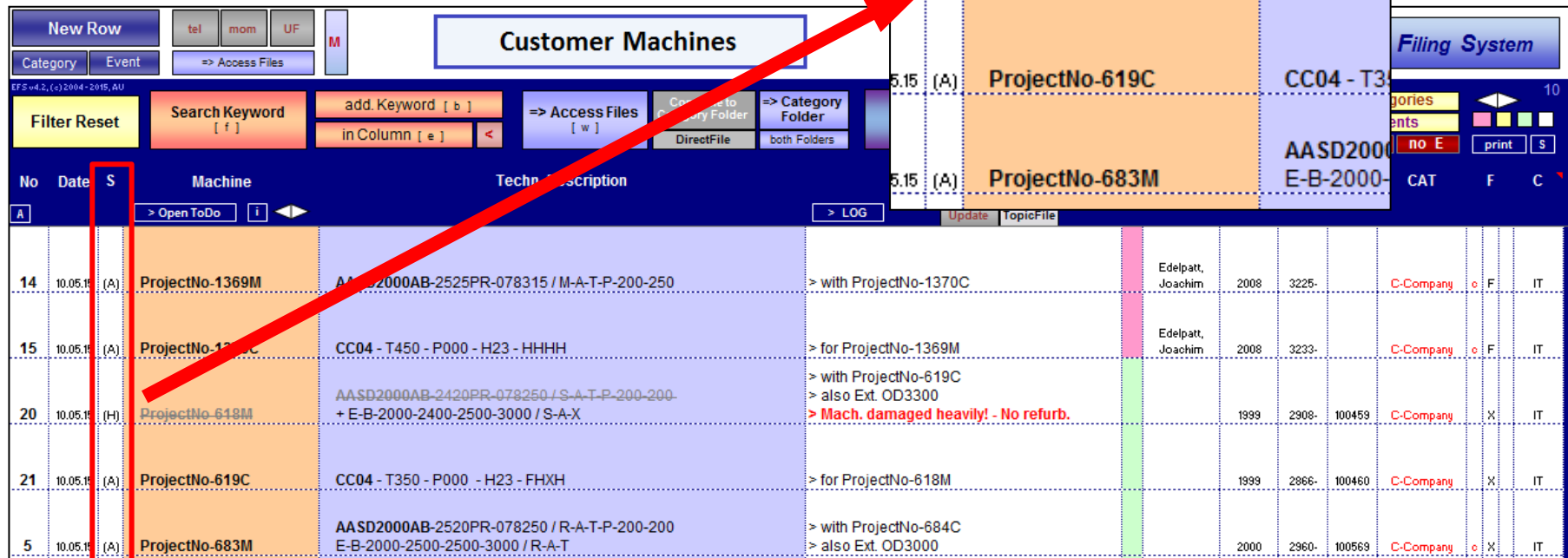
X71



The List | Helpful Improvements | DataStatus. (1/3)

► Data Status

- (A) – actual
- (H) – historic
- (I) - invalid



No	Date	S	Machine	Technical Description
14	10.05.15	(A)	ProjectNo-1369M	AAASD2000AB-2525PR-078315 / M-A-T-P-200-250
15	10.05.15	(A)	ProjectNo-1370C	CC04 - T450 - P000 - H23 - HHHH
20	10.05.15	(H)	ProjectNo-618M	AAASD2000AB-2420PR-078250 / S-A-T-P-200-200- + E-B-2000-2400-2500-3000 / S-A-X
21	10.05.15	(A)	ProjectNo-619C	CC04 - T350 - P000 - H23 - FHXX
5	10.05.15	(A)	ProjectNo-683M	AAASD2000AB-2520PR-078250 / R-A-T-P-200-200- E-B-2000-2500-2500-3000 / R-A-T

The List | Helpful Improvements | DataStatus. (2/3)

- ▶ PrioSearch | actual data only
 - ▶ two search levels
 - ▶ filter criteria + status „(A)“

New Row

telmomUF

M

Category

Event

=> Access Files

Customer Machines

Prio-Filter
C-Company + (A)
sorted: column "C"

Excel Filing System

Filter Reset

Search Keyword [f]

add. Keyword [b]

in Column [e]

=> Access Files [w]

Copy File to Category Folder
DirectFile

=> Category Folder
both Folders

Categories [k]

a]

A Z

Categories

Events

no Cno E

print

S

NoDateSMachine

Techn. Description

Remarks

PM

PY

dwg

ON

CAT

F

C

> Open ToDo

I

<

> LOG

Create / Update

Open TopicFile

14	10.05.15	(A)	ProjectNo-1369M	AASD2000AB-2525PR-078315 / M-A-T-P-200-250	> with ProjectNo-1370C	Edelpatt, Joachim	2008	3225-		C-Company	c	F	IT
15	10.05.15	(A)	ProjectNo-1370C	CC04 - T450 - P000 - H23 - HHHH	> for ProjectNo-1369M	Edelpatt, Joachim	2008	3233-		C-Company	c	F	IT
21	10.05.15	(A)	ProjectNo-619C	CC04 - T350 - P000 - H23 - FHXH	> for ProjectNo-618M		1999	2866-	100460	C-Company	X		IT
5	10.05.15	(A)	ProjectNo-683M	AASD2000AB-2520PR-078250 / R-A-T-P-200-200 E-B-2000-2500-2500-3000 / R-A-T	> with ProjectNo-684C > also Ext. OD3000		2000	2960-	100569	C-Company	c	X	IT
6	10.05.15	(A)	ProjectNo-684C	CC04 - T350 - P000 - H23 - FHXH	> for ProjectNo-683M		2000	2961-	100569	C-Company	X		IT

The List | Helpful Improvements | DataStatus. (3/3)

- ▶ historic data available by removing one search level

Customer Machines														
Excel Filing System														
Prio-Filter C-Company sorted: column "CAT"														
Categories [k]														
Σ [a]														
no C no E														
print S														
No	Date	S	Machine	Techn. Description	Remarks	PM	PY	dwg	ON	CAT	F	C		
14	10.05.15	(A)	ProjectNo-1369M	AASD2000AB-2525PR-078315 / M-A-T-P-200-250	> with ProjectNo-1370C	Edelpatt, Joachim	2008	3225-		C-Company	o	F	IT	
15	10.05.15	(A)	ProjectNo-1370C	CC04 - T450 - P000 - H23 - HHHH	> for ProjectNo-1369M	Edelpatt, Joachim	2008	3233-		C-Company	o	F	IT	
20	10.05.15	(H)	ProjectNo-618M	AASD2000AB-2420PR-078250 / S-A-T-P-200-200- + E-B-2000-2400-2500-3000 / S-A-X	> with ProjectNo-619C > also Ext. OD3300 > Mach. damaged heavily! - No refurb.		1999	2908-	100459	C-Company		X	IT	
21	10.05.15	(A)	ProjectNo-619C	CC04 - T350 - P000 - H23 - FHXH	> for ProjectNo-618M		1999	2966-	100460	C-Company		X	IT	
5	10.05.15	(A)	ProjectNo-683	AASD2000AB-2520PR-078250 / R-A-T-P-200-200 E-B-2000-2500-2500-3000 / R-A-T	> with ProjectNo-684C > also Ext. OD3000		2000	2960-	100569	C-Company	o	X	IT	
6	10.05.15	(A)	ProjectNo-684C	CC04 - T350 - P000 - H23 - FHXH	> for ProjectNo-683M		2000	2961-	100569	C-Company		X	IT	

The List | Helpful Improvements | Settings. (1/2)

- ▶ many general settings for EFS in separate sheet
- ▶ allow adjustments of powerful EFS functions for each single EFS application

19	5	10.05.15	(A)	ProjectNo-683M	AASD2000AB-2520PR-078250 / R-A-T-P-200-200 E-B-2000-2500-2500-3000 / R-A-T	> with ProjectNo-684C > also Ext. OD3000		2000	2960-	100569	C-Company	o	X	IT
20	6	10.05.15	(A)	ProjectNo-684C	CC04 - T350 - P000 - H23 - FHXH	> for ProjectNo-683M		2000	2961-	100569	C-Company		X	IT
21	2	10.05.15	(A)	ProjectNo-691M	AAS1800TB-2010PR-047132 / X-A-X-P-150-145 E-B-1500-1810-1600-1970 / R-A-X	> with ProjectNo-692C > also Ext. OD2425	Salto, Peter	2000	2973-	100720	C-Company		X	IT

EFS 4.2 settings personal remarks

Bereit 10 von 24 Datensätzen gefunden.

The List | Helpful Improvements | File Status.

- ▶ file status window | click at „No“
- ▶ compact overview | most important settings

The screenshot displays the EFS application interface, which includes a compact overview of file status and a detailed file status window.

Compact Overview (Top Right):

- Buttons:** New Row, tel, mom, UF, M, Customer, Category, Event, => Access Files.
- Search:** Search Keyword [f], add. Keyword [b], in Column [e], => Access Files [w].
- Filter:** Filter Reset, Filter Reset.
- Table Headers:** No, Date, S, Machine, Techn. Description.
- Table Data:**

No	Date	S	Machine	Techn. Description
14	10.05.15	(A)	ProjectNo-1369M	AASD2000AB-2525PR-078315 / M-A-T-P-2
15	10.05.15	(A)	ProjectNo-1370C	CC04 - T450 - P000 - H23 - HHHH
20	10.05.15	(H)	ProjectNo-618M	AASD2000AB-2420PR-078250 / S-A-T-P-2 + E-B-2000-2400-2500-3000 / S-A-X
21	10.05.15	(A)	ProjectNo-619C	CC04 - T350 - P000 - H23 - FHXX

File Status Window (Bottom Left):

FILE STATUS

Filename: EFS-4.2_X71_1+2_CustomerMachines_fictive.xls
EFS version: v4.2 X71, (c) 2004 - 2015, AU
User: Andreas Ulkan [10003]

QuickView: TopicFile
DirectFile: column "Machine", pdf
Log/TopicFile: column "Machine"
CopyFile Type: TopicFile

LogBook activated: No

Sort Columns: 1. "CAT", UP
2. "Machine", UP

Sort by Search: Yes

Search Columns: "Machine", "Location / Contacts", "Keywords", "Techn. Description" [5th column: "CAT"]

red: bought from market
yellow: market, but HK refurb
green: bought from HK
white: irrelevant

OK

The List | Helpful Improvements | Personal Remarks.

- ▶ room for personal remarks in separate sheet

The screenshot displays the EFS 4.2 software interface. On the left, a table lists project data:

Row	Index	Date	Category	ProjectNo	Remarks
19	5	10.05.15	(A)	ProjectNo-683M	AASD2000AB-2520PR-078250 E-B-2000-2500-2500-3000 / R-A
20	6	10.05.15	(A)	ProjectNo-684C	CC04 - T350 - P000 - H23 - FHX
21	2	10.05.15	(A)	ProjectNo-691M	AAS1800TB-2010PR-047132 / X E-B-1500-1810-1600-1970 / R-A

Below the table, the software's tab bar shows 'EFS 4.2', 'settings', and 'personal remarks'. A red arrow points to the 'personal remarks' tab. The status bar at the bottom indicates 'Bereit 10 von 24 Datensätzen gefunden.'.

On the right, a separate window titled 'Remarks' is shown, featuring a large grid for entering personal remarks. The 'EFS' logo is visible in the top right corner of this window.

The List | Helpful Improvements | Shortcuts.

- ▶ many customized shortcuts available
 - ▶ important ones indicated at buttons | e.g. Search Keyword [f]
 - ▶ list of shortcuts | button „S“

The screenshot displays the Excel Filing System (EFS) interface. At the top, there's a header bar with 'New Row', 'tel', 'mom', 'UF', and 'M' buttons. Below this is a 'Category' and 'Event' section, and a 'Search Keyword' field with 'add. Keyword [b]' and 'in Column [e]' buttons. A 'Filter Reset' button is also present. The main data table has columns: No, Date, S, Machine, and Techn. The table contains several rows of data, including 'ProjectNo-1369M', 'ProjectNo-1370C', 'ProjectNo-618M', 'ProjectNo-619C', and 'ProjectNo-683M'. A 'Microsoft Excel' window is open in the foreground, displaying a list of shortcuts. A red box highlights the 'S' button in the top right corner of the EFS interface.

Shortcuts

Strg	Shortcut
+ q	new row
+ a	collect rows (acc. to category)
+ r	filter reset
+ f	search keyword
+ b	search additional keyword
+ e	search keyword in active column
+ Sh + r	reset last search level
+ w	access files
+ j	copy file into category folder (DirectFile, LogBook [pdf] or TopicFile [pdf])
+ k	show category window
+ o	QuickView
+ d	open DirectFile
+ t	open TopicFile (Excel)
+ l	open LogBook (Excel)
+ n	new status entry for LogBook

The List | Standard Context Menu.

- ▶ still remaining: standard Excel context menu
- ▶ surprised?

The screenshot displays the 'Customer Machines' section of the Excel Filing System. A context menu is open over a table, showing standard Excel options. A red arrow points to the 'Zelle löschen' (Delete Cell) option.

Date	S	Machine	Techn. Descr.	Remarks	PM	PY	dwg	ON	CAT
0.05.15	(A)	ProjectNo-1369M	AASD2000AB-2525PR-078315 / M-A	with ProjectNo-1370C	Edelpatt, Joachim	2008	3225-		C-Company
0.05.15	(A)	ProjectNo-1370C	CC04 - T450 - P000 - H23 - HHHH	for ProjectNo-1369M	Edelpatt, Joachim	2008	3233-		C-Company
0.05.15	(H)	ProjectNo-618M	AASD2000AB-2420PR-078250 / S-A + E-B-2000-2400-2500-3000 / S-A-X	with ProjectNo-619C also Ext. OD3300 lisch, damaged heavily! - No refurb.		1999	2908-	100459	C-Company
0.05.15	(A)	ProjectNo-619C	CC04 - T350 - P000 - H23 - FHXH	for ProjectNo-618M		1999	2866-	100460	C-Company
0.05.15	(A)	ProjectNo-683M	AASD2000AB-2520PR-078250 / R-A-T-P-200-200 E-B-2000-2500-2500-3000 / R-A-T	with ProjectNo-684C also Ext. OD3000		2000	2960-	100569	C-Company
0.05.15	(A)	ProjectNo-684C	CC04 - T350 - P000 - H23 - FHXH	for ProjectNo-683M		2000	2961-	100569	C-Company
0.05.15	(A)	ProjectNo-691M	AAS1800TB-2010PR-04713 / A-A-X-P-150-145 E-B-1500-1810-1600-1970 / R-A-X	with ProjectNo-692C also Ext. OD2425	Salto, Peter	2000	2973-	100720	C-Company

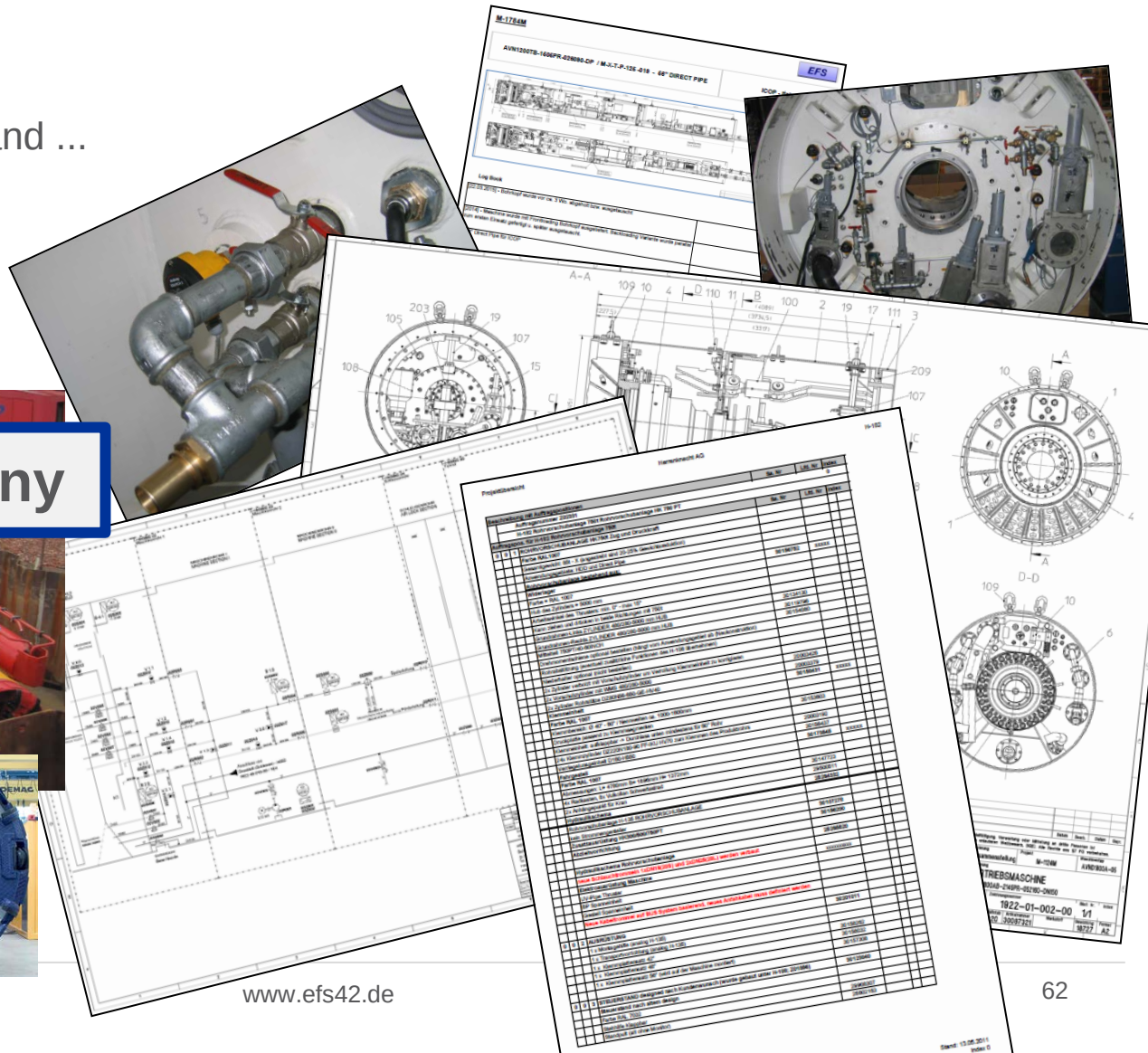
Agenda.

- ▶ Introduction & Key Elements
- ▶ The List
- ▶ **The List & FileStorage**
- ▶ The List & DirectFiles
- ▶ The List & MemoFiles
- ▶ The List & TopicFiles
- ▶ The List & LogBooks
- ▶ The ToDo-List
- ▶ Don'ts
- ▶ Examples

The List & FileStorage | Example 2 – Customer Machines.

- ▶ many customers,
many many machines, and ...
- ▶ many documents

C - Company



The List & FileStorage | Access Files.

- one folder related to each specific entry

The screenshot displays the EFS software interface. At the top, there's a header bar with buttons like 'New Row', 'tel', 'mom', 'UF', and 'M'. Below this is a 'Customer Machines' section with a table. The table has columns: No, Date, S, Machine, Techn. Description, and Remarks. Row 8 is circled in red. To the right of the table is a 'Filter Reset' button and a 'Search Keyword' field. Below the table, there's a 'LOG' button and a 'Create / Update' button. On the right side, there's a 'Categories' section with a 'D-Company' button. A red box highlights the 'Access Files' button in the 'Customer Machines' section. A red arrow points from this button to a file storage window. Another red arrow points from the file storage window to the 'ProjectNo-1110M' folder. A third red arrow points from the 'ProjectNo-1110M' folder to the 'ProjectNo-1110M_Scheme_Machine...' file. On the right side of the interface, there are technical drawings of a machine, including a top view (A-A), a side view (B-B), and a cross-section (C-C). Below the drawings is a table with columns: Pos, Name, and Art.Nr. The table lists various files and their corresponding article numbers.

No	Date	S	Machine	Techn. Description	Remarks
7	10.05.15	(A)	CATEGORY - D-Company		
13	10.05.15	(A)	ProjectNo-045	R250T - 100 - 90 - stand alone - 1 - 400 - 7 - 15	
9	10.05.15	(A)	ProjectNo-1109C	CC03 - T250 - P000 - H15 - FFXF	
8	10.05.15	(A)	ProjectNo-1110M	AAS1600TB-1970PR-052160/M	
23	04.06.15	(A)	ProjectNo-1344M	AASD1600AB-2125PR-052160/M	

Pos	Name	Art.Nr.
300	Hydraulikschema Schneidfräse	25257575
301	Hydraulikschema Steuerung	25157576
302	Fettschema Maschine	25257579
303	Wasserschema	25257580
304	Förderkreis/Entwässerung	25257581
305	Bentonitschema	25257582
305	Schema Gasanlage	25257585

The List & FileStorage | Category Folder.

- additional relation to category folder

Customer Machines

Prio-Filter
D-Company + (A)
sorted: column "CAT"

Excel Filing System

Filter Reset Search Keyword [f] add. Keyword [b] => Access Files [w] Copy File to Category Folder DirectFile => Category Folder both Folders Categories [k] Σ [a] A Z < Categories Events no C no E print S

No	Date	S	Machine	Techn. Description	Remarks	PM	PY	dwg	ON	CAT	F	C
7	10.05.15	(A)	CATEGORY - D-Company							D-Company		IT
13	10.05.15	(A)	ProjectNo-045	R250T - 100 - 90 - stand alone - 1 - 400 - 7 - 15		Lieber, Michael	2005	3599-	10115	D-Company	F	IT
9	10.05.15	(A)	ProjectNo-1109C	CC05 - 1250 - P000 - H15 - PXP		Belder, Michael	2005	3678-	101516	D-Company	X	IT
8	10.05.15	(A)	ProjectNo-1110M	AAS1600TB-1970PR-047160 / M-X-T-P-150-170		Belder, Michael	2005	3666-	101515	D-Company	X	IT
23	04.06.15	(A)	ProjectNo-1344M	AASD1600AB-2125PR-052160 / M-A-T-P-200-250					102303	D-Company	X	IT
10	10.05.15	(A)	ProjectNo-850M	AAS800XC-1110PR-009075 / R-X-X-X-100-145, meist mit ProjectNo-304C + E-B-800-1110-1200-1505 / S-X-X					100859	D-Company	X	IT

Check aufnehmen Freigeben für

Name

- ProjectNo-045.pdf
- ProjectNo-850M.pdf
- ProjectNo-1109C.pdf
- ProjectNo-1344M.pdf

The List & FileStorage | Both Folders.

- ▶ open specific and category Folder

Customer Machines

Prio-Filter: D-Company + (A)
sorted: column "CAT"

Excel Filing System

Filter Reset Search Keyword [f] add Keyword [b] => Access Files [w] Copy File to Category Folder DirectFile => Category Folder both Folders Categories [k] Σ [a] ↓ A Z Categories Events no C no E print S

No	Date	S	Machine	Techn. Description	Remarks	PM	PY	dwg	ON	CAT	F	C
7	10.05.15	(A)	CATEGORY - D-Company									
13	10.05.15	(A)	ProjectNo-045	R250T - 100 - 90 - stand alone - 1 - 400 - 7 - 15	Lieber, Michael	2005	3599-	10155		D-Company	F	IT
9	10.05.15	(A)	ProjectNo-1109C	CC05 - 1250 - P000 - H15 - PXP	Belder, Michael	2005	3678-	101516		D-Company	X	IT
8	10.05.15	(A)	ProjectNo-1110M	AAS1600TB-1970PR-047160 / M-X-T-P-150-170	Belder, Michael	2005	3666-	101515		D-Company	X	IT
23	04.06.15	(A)	ProjectNo-134M									
10	10.05.15	(A)	ProjectNo-850M									

thek aufnehmen Freigeben für Brennen

Name

- drawings
- incoming letters
- pics
- Main Scheme ProjectNo-1110M.pdf
- ProjectNo-1110M.pdf

thek aufnehmen Freigeben für

Name

- ProjectNo-045.pdf
- ProjectNo-850M.pdf
- ProjectNo-1109C.pdf
- ProjectNo-1344M.pdf

The List & FileStorage | Copy Files.

- copy specified files to category Folder (w/o opening folders)

Customer Machines

Prio-Filter: D-Company + (A)
sorted: column "CAT"

Excel Filing System

Filter Reset Search Keyword [f] add Keyword [b] => Access Files [w] Copy File to Category Folder [k] Categories [k]

Filter Reset Search Keyword [f] add Keyword [b] => Access Files [w] Copy File to Category Folder [k] Categories [k]

No	Date	S	Machine	Techn. Description	Remarks	PM	PY	dwg	ON	CAT	F	C
7	10.05.15	(A)	CATEGORY - D-Company									
13	10.05.15	(A)	ProjectNo-045	R250T - 100 - 90 - stand alone - 1 - 400 - 7 - 15	Licher, Michael	2005	3599	1010		D-Company	F	IT
9	10.05.15	(A)	ProjectNo-1109C	CC05 - 1250 - P005 - 1115 - P100	Belder, Michael	2005	3676	1010		D-Company	F	IT
8	10.05.15	(A)	ProjectNo-1110M	AAS1600TB-1970PR-047160 / M-X-T-P-150-170	Belder, Michael	2005	3676	1010		D-Company	F	IT
23	04.06.15	(A)	ProjectNo-1344M									
10	10.05.15	(A)	ProjectNo-850M									

File Storage Dialog:

Name

- drawings
- incoming letters
- pics
- Main Scheme ProjectNo-1110M.pdf
- ProjectNo-1110M.pdf

specified file „CopyFileType“

File Storage Dialog:

Name

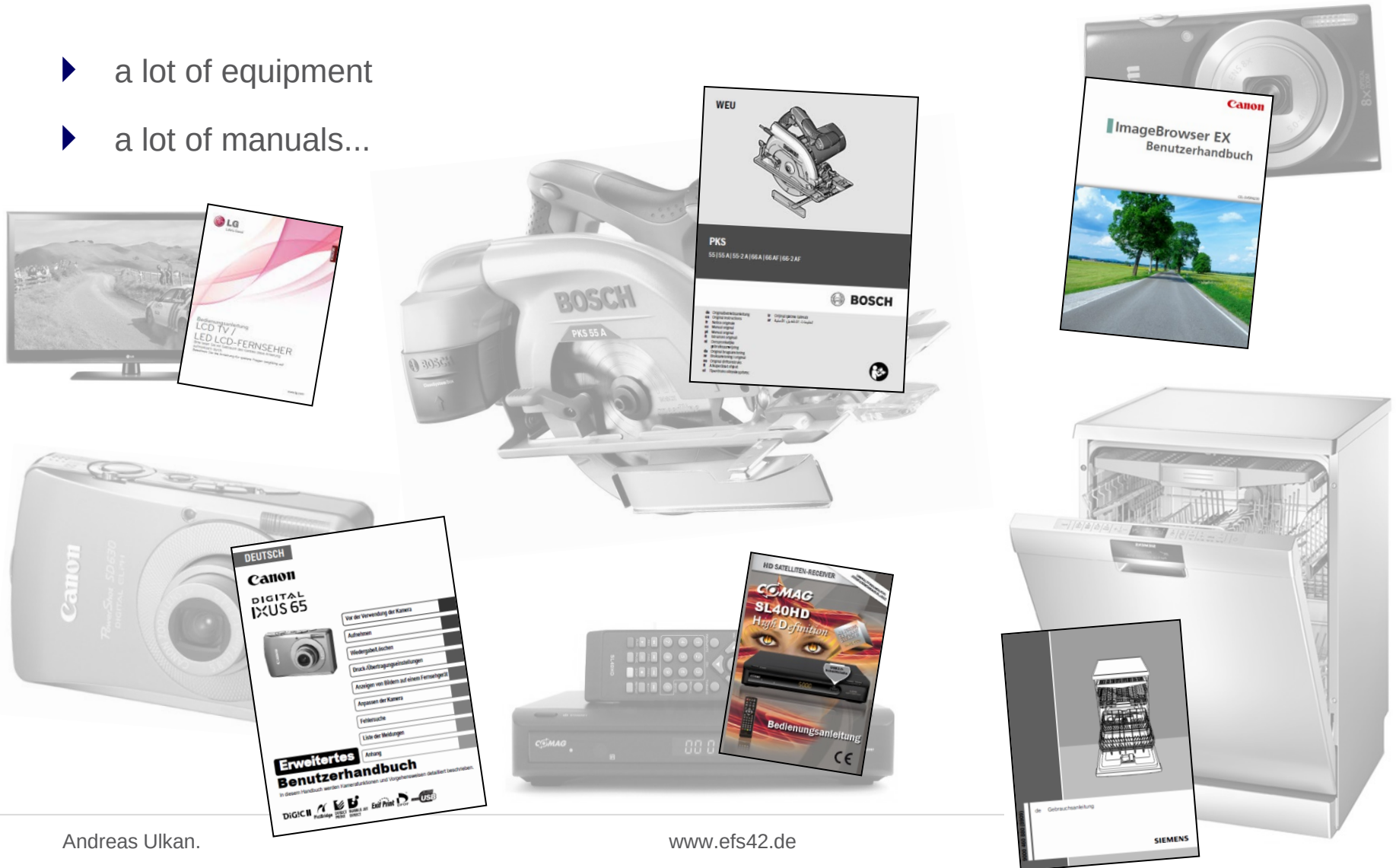
- ProjectNo-045.pdf
- ProjectNo-850M.pdf
- ProjectNo-1109C.pdf
- ProjectNo-1110M.pdf
- ProjectNo-1344M.pdf

Agenda.

- ▶ Introduction & Key Elements
- ▶ The List
- ▶ The List & FileStorage
- ▶ **The List & DirectFiles**
- ▶ The List & MemoFiles
- ▶ The List & TopicFiles
- ▶ The List & LogBooks
- ▶ The ToDo-List
- ▶ Don'ts
- ▶ Examples

The List & DirectFiles | Example 3 – Manuals.

- ▶ a lot of equipment
- ▶ a lot of manuals...



The List & DirectFiles | The EFS List.

- ▶ equipment listed | categories „Electronics“, „Household“, „Construction Tools“ etc.
- ▶ each manual in *.pdf version (per download or CD)

Manuals												
Excel Filing System												
No	Date	S	Device	Description	Remarks	www	Model	CAT	F	X		
10	09.05.15	(A)	Drying Machine - Zanussi	with heat re-use-system	approx. 2011	www	Zanussi ZTH 485	Household		D		
9	09.05.15	(A)	Dishwasher - silver - Siemens	Dish washer kitchen	approx. 2009	www	Siemens speedMatic Geschirrspüler SN26T890EU	Household		D		
8	09.05.15	(A)	CATEGORY - Household			C www		Household				
7	09.05.15	(A)	Hammer Drill 550W - Metabo	alternative hammer drill - replaces old Bosch 500W	bought 2014	www	Metabo SBE 550	Construction Tools		D		
6	09.05.15	(A)	Portable Circular Saw - Bosch		approx. 2012	www	Bosch PKS 55A	Construction Tools		D		
5	09.05.15	(A)	CATEGORY - Construction Tools			C		Construction Tools				
4	09.05.15	(A)	Receiver (HD) - Comaq	for TV in living room	approx. 2012	www	Comaq SL40HD	Electronics		D		

The List & DirectFiles | DirectFileName.

- ▶ DirectFileName | customized column (-> *settings*)
- ▶ DirectFileFormat | customized format (-> *settings*) | here: *.pdf

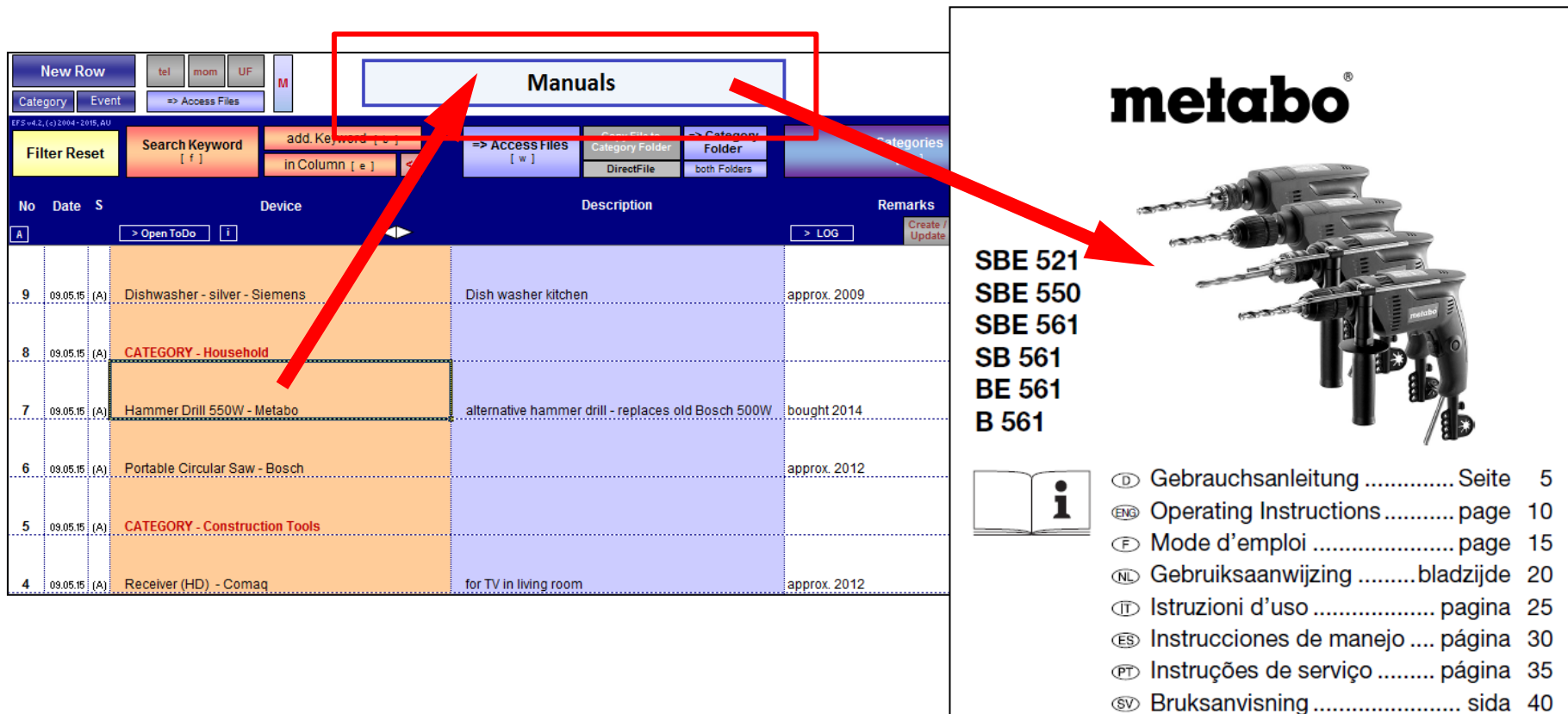
The screenshot shows the EFS interface with a table of files. The table has columns: Device, DirectFileName, Keywords, and Description. A red box highlights the DirectFileName column, and a red arrow points from it to a PDF file named '2013092010497gebruikershandleidingcom.pdf' in the Adobe Acrobat Pro window.

Device	DirectFileName	Keywords	Description
line - Zanussi	2013092010497gebruikershandleidingcom	Wäschetrockner, Wärmepumpentrockner	with heat re-use-system
- silver - Siemens	90004608801		
- Household			
II 550W - Metabo	824575-an-01-ml-SCHLAGBOHRMASCHINE_SBE_550_de_en_fr_nl	Bohrer, 500 Schlagbohr	
cular Saw - Bosch	961023_1_609_92A_0T4_1410pdf.	Bosch Han	

The Adobe Acrobat Pro window shows the PDF file '2013092010497gebruikershandleidingcom.pdf' with the title 'Benutzerinformation'.

The List & DirectFiles | QuickView.

- ▶ Select Row | Button QuickView (-> *settings*) or DirectFile
- ▶ That's it. DirectFile.



The screenshot shows the EFS software interface. A table lists various items, including a Dishwasher, a Hammer Drill, a Portable Circular Saw, and a Receiver. A red box highlights the 'Manuals' button in the top right corner of the table. A red arrow points from this button to a list of Metabo drill models and a table of contents.

metabo®

SBE 521
SBE 550
SBE 561
SB 561
BE 561
B 561

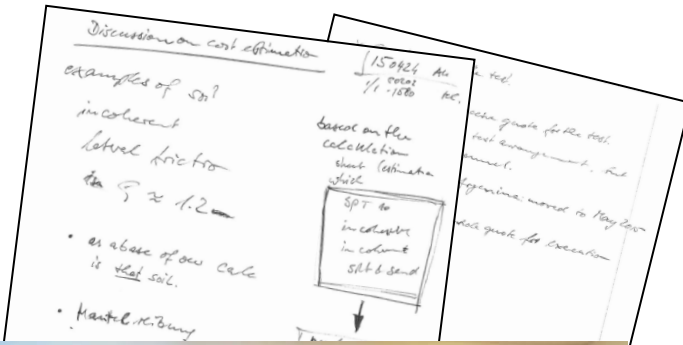
	(D) Gebrauchsanleitung	Seite	5
	(ENG) Operating Instructions	page	10
	(F) Mode d'emploi	page	15
	(NL) Gebruiksaanwijzing	bladzijde	20
	(IT) Istruzioni d'uso	pagina	25
	(ES) Instrucciones de manejo	página	30
	(PT) Instruções de serviço	página	35
	(SV) Bruksanvisning	sida	40

Agenda.

- ▶ Introduction & Key Elements
- ▶ The List
- ▶ The List & FileStorage
- ▶ The List & DirectFiles
- ▶ **The List & MemoFiles**
- ▶ The List & TopicFiles
- ▶ The List & LogBooks
- ▶ The ToDo-List
- ▶ Don'ts
- ▶ Examples

The List & MemoFiles | Example 4 – Notes & Memos.

- ▶ a lot of meetings
- ▶ a lot of notes & memos...



HERFENHEIT AG
BU Utility Tunneling

Memo: Salini Impregilo - HKAG | Riachuelo Risers | 14.04.2015

Salini Impregilo - HKAG | Riachuelo Risers | 14.04.2015

Agenda: Follow up of last meeting (31.03.2015 in Milan) - Next steps

Location, Date: Schwanau, Germany, 14.04.2015

Participant: Salini Impregilo (SI): Mr. A. Nicola, Mr. M. Lazzarini, Ms. M. Di Nauta
HKAG: Mr. A. Ulkan

	HK	CW17
SI received HK's reviewed concept drawings (dwg No 856-90-002-16_1-1_A & 856-90-002-16_2-2) end of last week.		
The general design has not been discussed during the meeting, but was considered as reasonable concept stage for later presentation for the client in Argentina.		
meeting and presentation with client in Argentina has been shifted. Probably the meeting will now take place begin of May 2015.		
SI will inform HK about the meeting date as soon they have the information.		
about 30 core drills are still planned along the alignment. The tunnel itself will be approx. 1,0km long; while the installation of the risers will take place only within the last 1.500m.		
SI pointed out again the importance of the equipment test in Schwanau and asks HK to share some parts of the costs.		
Basic idea is that		
SI could bear the costs for equipment and material, necessary design and construction works, personnel, assembly and disassembly of test equipment		
HK could bear the costs for test area, power and water supply, personnel to operate the test equipment and to assist the test, safety procedures, eventual modifications necessary on the jacking equipment (as results from test).		

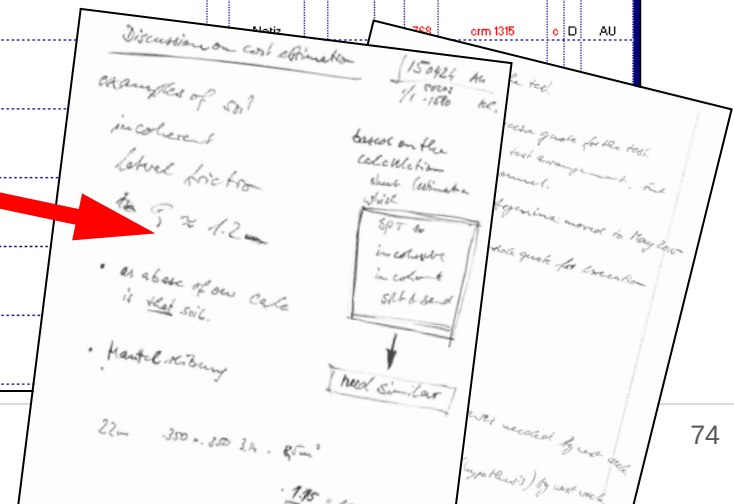
Page 2 of 4

HERFENHEIT AG
Schwanau, Germany

The List & MemoFiles | The EFS List.

- notes listed | categories: projects | participants in hidden columns
- DirectFiles | scanned documents

NOTES											
No	Date	Topics	Content	Remarks	DocType	FFF	y/in	CR	CAT	F	X
1617	30.04.15	150430_note_Glossar-ION_SA-AU	kurze Abstimmung f. Marschrichtung für's Glossar ION		Notiz				768	crm 1315	e D AU
1616	30.04.15	150429_note_ICOP-M-1963M-Nego_AGuerini-RKüsters-CSpiegel-AU	Contract negotiation Purchase contract AVN1000XB M-1963M Direct Pipe 48"	> incl. 150430_note_commercial-sorted-loop_AU (angedachte Abwicklung der einzelnen Themen)	Notiz				1495	ICOP D.P. 48" Malabergo	e D AU
1615	30.04.15	150430_note_iON-Regelmeeting_Marketing_AW-AMG-SBE-SA-HEG-LOG-AU	Vorstellung Marketing-Tool durch Sabrina, Sanktionslistenprüfung		Notiz				228	crm 1315	e D AU
1614	28.04.15	150428_note_RiachueloRisers_SPTs_SPR-MP-PS-AU	Diskussion Situation rund um Risers; Versuchsaufbau, Verdrängungsthematik u. vergleichbaren Verfahren.		Notiz						
1613	27.04.15	150424_note_iON-Regelmeeting_SA-HEB-KW-AW-CK-AU	Feedback Zugriff auf Nutzerdaten, Excel...		Notiz						
1612	27.04.15	150424_note_RiachueloRisers_GeoEstimation_SIL-AU	discussion on geological investigation and estimations regarding lateral friction etc.		Notiz						
1611	23.04.15	150423_note_Bachelor_MW-PS-AU	Besprechung weiteres Vorgehen in der Bachelorarbeit		Notiz						
1610	23.04.15	150423_note_RiachueloRisers_Costs_SBE-AU	Kosten und Kostenabschätzung Versuchsaufbau für Steel Risers für Riachuelo (Impregilo) durchgesprochen		Notiz						



The List & MemoFiles | Memo Template.

- ▶ memo template | automatically copied into DirectFileFolder
- ▶ 1) complete file name | 2) start writing memo

The screenshot displays the EFS software interface. On the left, a table lists files with columns for 'No', 'Date', and 'Name'. A red box highlights the 'Access Files' button in the top toolbar. On the right, a memo template is shown with fields for 'Agenda:', 'Ort-Datum:', and 'Teilnehmer:'. The template is pre-filled with placeholder text like 'XXXX' and '15.05.15'.

No	Date	Name
11	15.05.15	150430_note_iO AMG-SBE-SA-HE
10	15.05.15	150428_note_R AU
9	15.05.15	150424_note_iO-Regelmeeting_SA-HEB-KW-AW- CK-AU

Access Files

Search Keyword [f] add. Keyword [b] in Column [e] => Access [w]

Filter Reset

Open Drucken E-Mail Brennen

Name

150515_memo_XXXXXX_15xxxx.d

Agenda: → XXXX

Ort-Datum: → XXXX-xx.xx.2015

Teilnehmer: → XXXX Hr. XXXX

→ XXXX Hr. XXXX

→ privat Hr. Ulkana

XXXX

XXXX

XXXX

XXXX

XXXX

XXXX

XXXX

XXXX

XXXX

XXXX

The List & MemoFiles | The Memo.

- ▶ save memo | option: create pdf
- ▶ transfer file name to EFS list

New Row		tel	mom	UF	M	
Category	Event	=> Access Files				
EFS v4.2.0172, (c) 2004 - 2015, AU						
Filter Reset	Search Keyword [f]	add. Keyword [b]		in Column [e] <		
No	Date	Topics		Location / Contacts		
A	> Open ToDo		I			
14	15.05.15	**** pls insert file name of memo ****		en with Adobe Acrobat X Drucken		
13	15.05.15	150430_note_Glossar-iON_SA-AU		Name		
12	15.05.15	150429_note_ICOP-M-1963M-Nego_A RKüsters-CSpiegel-AU		150515_memo_EFS-Introductio		
11	15.05.15	150430_note_iON-Regelmeeting_Mar AMG-SBE-SA-HEG-LÖG-AU		150515_memo_EFS-Introductio		
10	15.05.15	150428_note_RiachueloRisers_SPTs_SPR-MB-PS-AU		Schwanau II 12, office PS II Steffen Praetorius, Matthias Botzenhardt, Peter Schmäh, Andreas Ulkan Schwanau II CBM/Container II		

Andreas Ulkan		AU	
Memo: Meeting EFS-Presentation 15.05.2015			
Memo: Meeting EFS-Presentation 15.05.2015			
Agenda:	Presentation of EFS - Introduction of Team		
Ort, Datum:	Frankfurt, 15.05.2015		
Teilnehmer:	Team:	Mr. Müller, Mr. Meier, Ms. Schmidt, Ms. Schneider	
	Trainer:	Mr. Ulkan	
-	Presentation of EFS		
-	detailed introduction and questions / answers		
-	DirectFile concept transferred to the working process of the team		
-	specific prototype of DirectFile system will be prepared till next meeting	MS	CW22
-	Doc N function discussed		
-	- MemoFiles concept with automatic templates seemed quite new		
-	- needs special team training	AU	CW22
-	Concept of LogBook could not be finished today. -> next meeting		CW22
noted by Andreas Ulkan.			

The List & MemoFiles | Memo Destination.

- ▶ two options where to insert memo
- ▶ 1) new row | 2) selected row

The screenshot shows the EFS interface with a list of memos. A red box highlights the 'New Row' button and the 'mem' button. A dialog box titled 'EFS - Question' is overlaid on the list, asking 'Do you want to insert a new row?'. The dialog has two options: 'Yes = open memo form in a NEW row' and 'No = open memo form in ACTIVE row'. A red arrow points from the 'mem' button to the 'Yes' option in the dialog.

No	Date	Topics	Content	Remarks	X
14	15.05.15	150515_memo_EFS-Introduction_to_Team	Presentatio		Notiz
13	15.05.15	150430_note_Glossar-ion_SA-AU	kurze Abstini		Notiz
12	15.05.15	150429_note_ICOP-M-1963M-Nego_AGuerini-RKüsters-CSpiegel-AU	Contract neg		Notiz
11	15.05.15	150430_note_iON-Regelmeeting_Marketing_AW-AMG-SBE-SA-HEG-LOG-AU	Vorstellung M		Notiz
10	15.05.15	150428_note_RiachueloRisers_SPTs_SPR-MB-PS-AU	Diskussio		Notiz
9	15.05.15	150424_note_iON-Regelmeeting_SA-HEB-KW-AW-CK-AU	Feedback Zugr		Notiz
8	15.05.15	150424_note_RiachueloRisers_GeoEstimation_SIL-AU	discussion on geological investigation and estimations regarding lateral friction etc.		Notiz

The List & MemoFiles | Alternative Templates.

- ▶ telephone note | always new row
- ▶ user form | file name prefix & format customized (-> *settings*)
- ▶ same principle like memo template

The screenshot shows the EFS software interface. At the top, there is a 'New Row' section with three buttons: 'tel', 'mom', and 'UF'. The 'tel' and 'mom' buttons are highlighted with red boxes. Below this is a table with columns 'No', 'Date', 'Topics', and 'Content'. The table contains two rows of data.

No	Date	Topics	Content
14	15.05.15	150515_memo_EFS-Introduction_to_Team	Presentatino and introduction
13	15.05.15	150430_note_Glossar-ion_SA-AU	kurze Abstimmung f. Marschr ION

Agenda.

- ▶ Introduction & Key Elements
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- ▶ **The List & TopicFiles**
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- ▶ Don'ts
- ▶ Examples

The List & TopicFiles | Example 5 – Device Info Sheet.

- ▶ equipment test
- ▶ comments required



Portable Circular Saw - Bosch

hand saw - powerful for small mobile works

AU

Bosch Handkreissäge

Model: Bosch | PKS 55 A

Remarks: approx. 2012

Topic File

very good balance - stable and safe feeling at guiding the saw.

Compact design with good center of gravity. Easy to handle - and safe protection of blade. Typical adjustments of the guiding devices - the screws have to be fixed with care.

Very nice detail: for small works a small container exists to collect the material; for bigger shavings immediately.

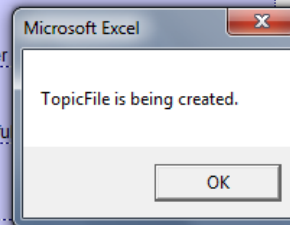
Price quite reasonable for the quality and safety of this portable saw.

Price below 130 EUR.

The List & TopicFiles | The EFS List.

- ▶ equipment listed | manuals as DirectFiles
- ▶ TopicFile | specified contents inserted

Manuals												
Excel Filing System												
EFS v4.2, (c) 2004-2015, AU												
Filter Reset Search Keyword [f] add. Keyword [b] in Column [e] => Access Files [w] Copy File to Category Folder DirectFile => Category Folder both Folders Categories [k] Categories Events no C no E print S												
No	Date	S	Device	Description	Remarks	www	Model	CAT	F	X		
A												
8	09.05.15	(A)	CATEGORY - Household			C	www	Household				
7	09.05.15	(A)	Hammer Drill 550W - Metabo	alternative hammer	light 2014	www	Metabo SBE 550	Construction Tools	D	T		
6	09.05.15	(A)	Portable Circular Saw - Bosch	hand saw - powerfu	prox. 2012	www	Bosch PKS 55A	Construction Tools	D	T		
5	09.05.15	(A)	CATEGORY - Construction Tools			C		Construction Tools				
4	09.05.15	(A)	Receiver (HD) - Comaq	for TV in living room	approx. 2012	www	Comaq SL40HD	Electronics	D	T		
3	09.05.15	(A)	TV Living Room - LG	26LE5500 Flatscreen	approx. 2012	www	LG 26LE5500	Electronics	D	T		
2	09.05.15	(H)	Digital Camera IXUS 65 - Canon	IXUS65 old digital compact camera AU	approx. 2006		Canon IXUS 65	Electronics	D	T		



The List & TopicFiles | TopicFile Template.

- ▶ pre-defined TopicFile | specified contents filled (-> *settings*) | up to 8 contents
- ▶ open TopicFile | layout can be customized

Portable Circular Saw - Bosch		AU	
hand saw - powerful for small mobile works		Bosch Handkreissäge	
		Construction Tools	
insert picture, map or screenshot here...		Model: Bosch PKS 55A	
		Remarks: approx. 2012	
Topic File			
2	09.05.15 (H)	Digital Camera IXUS 65 - Canon	IXUS65 old digital compact camera AU approx. 2006

Excel Filing System	
Categories [k]	Σ [a]
Categories	Events
no C	no E
print	S
Remarks	www Model CAT F X
Create / Update	Open TopicFile
2014	www Metabo SBE 550
2012	www Bosch PKS 55A
2012	www Comaq SL40HD
2012	www LG 26LE5500
	Canon IXUS 65

The List & TopicFiles | TopicFile Content.

- ▶ further contents completely free
- ▶ e.g. picture and text can be inserted according to needs

Portable Circular Saw - Bosch			Portable Circular Saw - Bosch		
hand saw - powerful for small mobile works			hand saw - powerful for small mobile works		
					
Model: Bosch P Remarks: approx. 2012			Model: Bosch PKS 55A Remarks: approx. 2012		
Topic File very good balance - stable and safe feeling at guiding the saw. Compact design with good center of gravity. Easy to handle - and safe protection of blade. Typical adjustments of the guiding devices - the screws have to be fixed with care.			Topic File very good balance - stable and safe feeling at guiding the saw. Compact design with good center of gravity. Easy to handle - and safe protection of blade. Typical adjustments of the guiding devices - the screws have to be fixed with care.		

The List & TopicFiles | TopicFile Update.

- ▶ update of EFS content | transfer into TopicFile
- ▶ manually inserted contents remain unchanged

Portable Circular Saw - Bosch		AU	
hand saw - powerful for small mobile works		Bosch Handkreissäge	
		Construction Tools	
		Model: Bosch PKS 55A	
		Remarks: approx. 2012 OR 2013	
Topic File			
very good balance - stable and safe feeling at guiding the saw.			
Compact design with good center of gravity. Easy to handle - and safe protection of blade. Typical adjustments of the guiding devices - the screws have to be fixed with care.			
2	09.05.15 (H)	Digital Camera IXUS 65 - Canon	IXUS65 old digital compact camera AU approx. 2006

Excel Filing System									
Categories [k]		Σ [a]	↓ A Z	Categories	no C no E		print	13	
Remarks		www	Model	CAT	F	X			
> LOG		Create / Update	Open TopicFile						
		www		Household					
bought 2014		www	Metabo SBE 550	Construction Tools	D	T			
approx. 2012 OR 2013		www	Bosch PKS 55A	Construction Tools	D	T			
		C		Construction Tools					
approx. 2012		www	Comaq SL40HD	Electronics	D	T			
approx. 2012		www	LG 26LE5500	Electronics	D	T			
			Canon IXUS 65	Electronics	D	T			

The List & TopicFiles | QuickView pdf.

- ▶ TopicFile can be saved as pdf
- ▶ QuickView Button | pdf-TopicFile (-> settings)

New Row

tel

mom

UF

M

Category

Event

=> Access Files

Manuals

Filter Reset

Search Keyword [f]

add. Keyword [b]

in Column [e]

=> Access Files [w]

Copy File to Category Folder

DirectFile

=> Category Folder

both Folders

No

Date

S

Device

Description

> Open ToDo

i

> LOG

8	09.05.15	(A)	CATEGORY - Household	
7	09.05.15	(A)	Hammer Drill 550W - Metal	alternative hammer drill - replaces old Bosch 500W bought 2014
6	09.05.15	(A)	Portable Circular Saw - Bosch	hand saw - powerful for small mobile works approx. 2012
5	09.05.15	(A)	CATEGORY - Construction Tools	
4	09.05.15	(A)	Receiver (HD) - Comag	for TV in living room approx. 2012
3	09.05.15	(A)	TV Living Room - LG	26LE5500 Flatscreen approx. 2012
2	09.05.15	(H)	Digital Camera IXUS 65 - Canon	IXUS65 old digital compact camera AU approx. 2006

Portable Circular Saw - Bosch

AU

hand saw - powerful for small mobile works

Bosch Handkreissäge



Construction Tools

Model: Bosch | PKS 55A

Remarks: approx. 2012 OR 2013

Topic File

very good balance - stable and safe feeling at guiding the saw.

Compact design with good center of gravity. Easy to handle - and safe protection of blade. Typical adjustments of the guiding devices - the screws have to be fixed with care.

Very nice detail: for small works a small container exists to collect the material, for bigger projects a hose from a suction system can easily be attached in order to remove the wood shavings immediately.

Price quite reasonable for the quality and safety of this portable saw.

Price below 130 EUR.

Andreas Ulkan

©BerntWormer

page 1 of 1

„T Portable Circular Saw - Bosch-Handkreissäge“
printed: 16.08.2015, 20:38

Agenda.

- ▶ Introduction & Key Elements
- ▶ The List
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- ▶ The ToDo-List
- ▶ Don'ts
- ▶ Examples

The List & LogBooks | Example 6 – Rental Machines.

- ▶ administration of rental equipment
- ▶ status documentation



<u>Liebherr A910 compact</u>		AU	
wheel excavator, middle size			
		Year	2013
		weight (t)	12,5
		width (m)	2,6
		€ / d (day)	198
		€ / d (week)	175
		€ / d (month)	143
Log Book		wiki	
[15.05.2015] - came back after short working period. > was not cleaned => extra charge!			
[11.05.2015] - rented out to Kullmer Road Services GmbH		#3	
[29.04.2015] - came back from repair - everything fine.			
[25.04.2015] - moved to repair (Liebherr workshop)			
[21.04.2015] - came back > damage at cabin (glas crack)			
[28.03.2015] - rented out to Palmbach & sons, Wonburg.		#2	
[16.02.2015] - came back from Willand. Condition ok.			
[26.01.2015] - rented out to Comp. Willand & Co, Empirebach		#1	
[08.01.2015] - bought 2nd hand from Liebherr Dealer			

The List & LogBooks | The EFS List.

- ▶ equipment listed | categories „Excavators“, „Cranes“, „Drills and Hammer Drills“ etc.
- ▶ each status entry is automatically saved to related LogBook

EFS 4.2 - Rental Equipment														
Equipment														
New Row tel mom UF M Category Event => Access Files Filter Reset Search Keyword [f] add Keyword [b] in Column [e] => Access Files [w] Copy File to Category Folder DirectFile both Folders Save to Log [m] Open Log [l] Create Log Categories [k] Σ [a] A Z Categories [k] Events no C no E print S														
No	Date	Topics	Content	Log	year	weight (t)	width (m)	y/n	CAT	F	€/d day	€/d week	€/d month	
8	02.05.15	Volvo Crawler Excavator EC160D	crawler excavator, huge middle size	[05.04.2015] - rented out to Kullmer Road Services GmbH	2014	19,2	2,8		Excavators	L S	236	224	218	
7	02.05.15	Hilti TE7-C	Hammer drill for easy hand use	[02.05.2015] - sent to maintenance @ Hilti - CH	2015	0,0035			Drills and Hammer Drills	L S	15	13	11	
6	02.05.15	CATEGORY - Drills and Hammer Drills							Drills and Hammer Drills					
5	02.05.15	Liebherr 13HM	mobile crane (hydraulic version)	[16.12.2014] - came back, > everything fine.	2014	4,5	2,5		Cranes	L S	155	144	133	
4	02.05.15	CATEGORY - Cranes							Cranes					
3	02.05.15	Liebherr A910 compact	wheel excavator, middle size	[15.05.2015] - came back after short working period. > was not cleaned => extra charge!	2013	12,5	2,6		Excavators	L S	198	175	143	
2	02.05.15	Bobcat E20 - blue	crawler, cabin version	[17.04.2015] - rented out to Palmbach & sons, Wolmburg	2008	2	0,98		Excavators	L S	118	103	97	
1	02.05.15	CATEGORY - Excavators							Excavators	L				

The List & LogBooks | LogBook Procedure.

- ▶ new equipment | fill list
- ▶ LogBook | specified contents inserted | so far similar to TopicFile

EFS 4.2 - Rental Equipment

Equipment

Filter Reset Search Keyword [f] add Keyword [b] in Column [e] => Access Files [w] Copy File to Category Folder DirectFile => Category Folder both Folders Save to Log [m] Oper Log [i] **Create Log** Categories [k] Σ [a] A Z < Categories Events no C no E print S

No	Date	Topics	Content	Log	year	weight (t)	width (m)	y/n	CAT	F	€/d day	€/d week	€/d month
9	17.05.15	Komatsu Mini-Excavator PC16R-3	crawler excavator, mini excavator size		2015	1,6	1,8		Excavators	L	142	135	130
8	02.05.15	Volvo Crawler Excavator EC160D	crawler excavator, huge middle	out to Kullmer	2014	19,2	2,8		Excavators	L S	236	224	218
7	02.05.15	Hilti TE7-C	Hammer drill for easy hand u	maintenance @	2015	0,0035			Drills and Hammer Drills	L S	15	13	11
6	02.05.15	CATEGORY - Drills and Hammer Drills			C				Drills and Hammer Drills				
5	02.05.15	Liebherr 13HM	mobile crane (hydraulic version)	[16.12.2014] - came back, > everything fine.	2014	4,5	2,5		Cranes	L S	155	144	133
4	02.05.15	CATEGORY - Cranes			C				Cranes				
3	02.05.15	Liebherr A910 compact	wheel excavator, middle size	[15.05.2015] - came back after short working period. > was not cleaned => extra charge!	2013	12,5	2,6		Excavators	L S	198	175	143

Microsoft Excel
LogBook file is being created.
OK

The List & LogBooks | LogBook Template.

- ▶ pre-defined LogBook | specified contents filled (-> *settings*) | up to 8 contents
- ▶ open LogBook | layout can be customized

The screenshot displays two overlapping Excel spreadsheets. The background spreadsheet is a pre-defined LogBook for a 'Komatsu Mini-Excavator PC16R-3'. It features a red-bordered table with columns for 'Year', 'weight (t)', 'width (m)', and rental rates: '€ / d (day)', '€ / d (week)', and '€ / d (month)'. A red arrow points from the 'Open Log' button in the top right of this spreadsheet to the 'Open Log' button in the foreground spreadsheet.

The foreground spreadsheet is an open LogBook template. It has a dark blue header bar with buttons for 'File to Folder', 'Category Folder', 'Save to Log', 'Open Log', 'Create Log', 'Categories', and summary functions like 'Σ [a]' and 'A Z'. Below the header is a table with columns: 'Log', 'year', 'weight (t)', 'width (m)', 'y/n', and 'C/'. The table contains several log entries with dates, descriptions, and corresponding values in the other columns. A red arrow points from the 'Open Log' button in the background spreadsheet to the 'Open Log' button in the foreground spreadsheet.

Log	year	weight (t)	width (m)	y/n	C/
[05.04.2015] - rented out to Kullma Road Services GmbH	2015	1,6	1,8		Excav
[02.05.2015] - sent to maintenance @ Hilti - CH	2014	19,2	2,8		Excav
[16.12.2014] - came back, > everything fine.	2015	0,0035			Drill, Han, D
[15.05.2015] - came back after short working period. > was not cleaned => extra charge!	2014	4,5	2,5		Drill, Han, D
	2013	12,5	2,6		Excav

The List & LogBooks | New Status.

- ▶ button „New Status“
- ▶ actual date | ready to add status info | LogBook info: „U“ = unsaved

EFS 4.2 - Rental Equipment										Equipment			
Keyword [b]	=> Access Files [w]	Copy File to Category Folder	=> Category Folder	Save to Log [m]	Open Log [l]	Create Log	Categories [k]	Σ [a]	A Z	Categories	Events	no C	no E
Column [e]	<	DirectFile	both Folders										
Content	Log	year	weight (t)	width (m)	y/n	CAT	F	€ / d day	€ / week				
	New Status [n]												
crawler excavator, mini excavator size	[17.05.2015] -	2015	1,6	1,8		Excavators	L U	142	13				
crawler excavator, huge middle size	[05.04.2015] - rented out Kullmer Road Services GmbH	2014	19,2	2,8		Excavators	L S	236	22				
Hammer drill for easy hand use	[02.05.2015] - sent to maintenance @ Hilti - CH	2015	0,0035			Drills and Hammer Drills	L S	15	13				
mobile crane (hydraulic version)	[16.12.2014] - came back, > everything fine.	2014	4,5	2,5		Cranes	L S	155	14				

The List & LogBooks | Save Status.

- ▶ button „New Status“ | saves previous status to LogBook | provides new entry
- ▶ button „Save to Log“ | saves actual status to LogBook | LogBook info: „S“ = saved

Equipment			
Copy File to Category Folder	=> Category Folder	Save to Log [m]	Open Log [l]
DirectFile	both Folders	Create Log	Categories [k]
Log	New Status [n]	> Remarks	year
excavator size	[17.05.2015] -		2015
middle size	[05.04.2015] - rented out to Kullmer Road Services GmbH		2014
and use	[02.05.2015] - sent to maintenance @ Hilti - CH		2015
version)	[16.12.2014] - came back, > everything fine.		2014

Copy File to Category Folder	=> Category Folder	Save to Log [m]	Open Log [l]	Create Log	Categories [k]	Σ [a]	A Z	Categories Events
DirectFile	both Folders							no C no
Log	New Status [n]	> Remarks	year	weight (t)	width (m)	y/n	CAT	F
size	[17.05.2015] - complete functioning test		2015	1,6	1,8		Excavators	L S 142
size	[05.04.2015] - rented out to Kullmer Road Services GmbH		2014	19,2	2,8		Excavators	L S 236
	[02.05.2015] - sent to maintenance @ Hilti - CH		2015	0,0035			Drills and Hammer Drills	L S 15
	[16.12.2014] - came back, > everything fine.		2014	4,5	2,5		Cranes	L S 155

The List & LogBooks | LogBook Content.

- ▶ LogBook after two status entries
- ▶ everything automatically filled

Komatsu Mini-Excavator PC16R-3		AU	
crawler excavator, mini excavator size			
			
Log Book		wiki	
[17.05.2015] - complete functioning test			
[16.05.2015] - bought new from Komato Dealer			

year	weight (t)	width (m)	y/n	CAT	F	€/d day
2015	1,6	1,8		Excavators	L S	142
2014	19,2	2,8		Excavators	L S	236
2015	0,0035			Drills and Hammer Drills	L S	15
				Drills and Hammer Drills		
2014	4,5	2,5		Cranes	L S	155

The List & LogBooks | QuickView pdf.

- ▶ LogBook can be saved as pdf
- ▶ QuickView Button | pdf-LogBook (-> settings)

EFS 4.2 - Rental Equipment				
No	Date	Topics	Content	Log
5	02.05.15	Liebherr 13HM	mobile crane (hydraulic version)	[16.12.2014] - came back, > everything fine.
6	02.05.15	CATEGORY - Drills and Hammer Drills		
7	02.05.15	Hilti TE7-C	Hammer drill for easy hand use	[02.05.2015] - sent to maintenance @ Hilti - CH
1	02.05.15	CATEGORY - Excavators		
2	02.05.15	Bobcat E20 - blue	crawler, cabin version	[17.04.2015] - rented out to Palmbach & sons, Wolmburg
9	16.05.15	Komatsu Mini-Excavator PC16R	crawler excavator, mini excavator size	[17.05.2015] - complete functioning test
3	02.05.15	Liebherr A910 compact	wheel excavator, middle size	[15.05.2015] - came back after short working period. > was not cleaned => extra charge!
8	02.05.15	Volvo Crawler Excavator EC160D	crawler excavator, huge middle size	[05.04.2015] - rented out to Kullmer Road Services GmbH

Liebherr A910 compact		AU
wheel excavator, middle size		
		
Year	2013	
weight (t)	12,5	
width (m)	2,6	
€ / d (day)	198	
€ / d (week)	175	
€ / d (month)	143	
Log Book		with
[15.05.2015] - came back after short working period. > was not cleaned => extra charge!		
[05.05.2015] - rented out to Kullmer Road Services GmbH		#3
[29.04.2015] - came back from repair - everything fine.		
[25.04.2015] - moved to repair (Liebherr workshop)		
[21.04.2015] - came back > damage at cabin (glas crack)		
[28.03.2015] - rented out to Palmbach & sons, Wonburg.		#2
[16.02.2015] - came back from Willand. Condition ok.		
[26.01.2015] - rented out to Comp. Willand & Co, Empirebach		#1
[08.01.2015] - bought 2nd hand from Liebherr Dealer		

Agenda.

- ▶ Introduction & Key Elements
- ▶ The List
- ▶ The List & FileStorage
- ▶ The List & DirectFiles
- ▶ The List & MemoFiles
- ▶ The List & TopicFiles
- ▶ The List & LogBooks
- ▶ **The ToDo-List**
- ▶ Don'ts
- ▶ Examples

The ToDo-List | Example 7 – Project Team.

- ▶ project management | team & tasks
- ▶ regular meetings | status check



The ToDo-List | The EFS List.

- ▶ ToDo-List activated | categories „Offer“, „Test Procedure“ etc.
- ▶ tasks with status | not started – started – finished – info | color indication

Customer Project														
ToDo List														
New Row tel mom UF M Category Event => Access Files														
Filter Reset Search Keyword [f] add Keyword [b] in Column [e] => Access Files [w] Copy File to Category Folder DirectFile => Category Folder both Folders Categories [k] Σ [a] A Z < Categories Events no C no E print S														
No	Date	Tasks	Add.	Content	Remarks	with	till	CAT	F	X				
10	17.05.15	Done: define test scenario equipment	[ok, 150430]	mechanical preparation, test material,	already talked to Stefan. Should work. [30.04.2015]	Stefan	20.05.2015	Test-Procedure		X				
11	17.05.15	ToDo: offer check with project manager		Offer version t.b. checked upfront sending to customer	technical solution must be waterproof	Thomas	14.05.2015	Offer		X				
12	17.05.15	ToDo: drawings for functional test		refer to sketch from customer, e-mail dd. 17.04.2015	discussed e-mail w/Michael [28.04.2015]	Michael	12.05.2015	Test-Procedure		X				
13	17.05.15	ToDo: check prices with procurement dpt.		especially special hydraulic cylinders stroke 4.5m		Jennifer	12.05.2015	Offer		X				
14	17.05.15	Done: design of functional test	[ok, 150430]	with customer! -> agreement upfront needed!				Test-Procedure		X				
15	17.05.15	CATEGORY - Test-Procedure				C		Test-Procedure						
16	17.05.15	ToDo: organize drawings				Michael	07.05.2015	Offer		X				
17	17.05.15	ToDo: sort & categorize requirements					05.05.2015	Offer		X				

The ToDo-List | Unfinished Tasks.

- ▶ quick overview unfinished tasks | sorted acc. to categories (option)
- ▶ finished tasks hidden

New Row

tel

mom

UF

M

Category

Event

=> Access Files

Customer Project

Filter Reset

Search Keyword [f]

add Keyword [b]

=> Access Files [w]

Copy File to Category Folder

=> Category Folder

DirectFile

both Folders

No

Date

▼

A

1

> Close ToDo

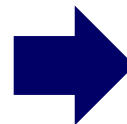
Tasks

◀▶

Add.

Content

10	✓ 17.05.15	Done:	define test scenario equipment	[ok, 150430]	mechanical preparation, test material.
9	17.05.15	ToDo:	offer check with project manager		Offer version t.b. checked upfront sending to customer
8	17.05.15	ToDo:	drawings for functional test		refer to sketch from customer, e-mail dd. 17.04
7	17.05.15	ToDo:	check prices with procurement dpt.		especially special hydraulic cylinders stroke 4.
6	✓ 17.05.15	Done:	design of functional test	[ok, 150430]	with customer! -> agreement upfront needed!
5	17.05.15		CATEGORY - Test-Procedure		
4	17.05.15	ToDo:	organize drawings		
3	17.05.15	ToDo:	sort & categorize requirements		



New Row

tel

mom

UF

M

Customer Project

Category

Event

=> Access Files

EFS v4.2.072, (c) 2004 - 2015, AU

Filter Reset

Search Keyword [f]

add Keyword [b]

=> Access Files [w]

Copy File to Category Folder

=> Category Folder

in Column [e]

<

DirectFile

both Folders

No

Date

Tasks

Add.

Content

A

1

30.04.15

CATEGORY - Offer

9

30.04.15

ToDo: offer check with project manager

Offer version t.b. checked upfront sending to customer

7

30.04.15

ToDo: check prices with procurement dpt.

especially special hydraulic cylinders stroke 4.5

3

30.04.15

ToDo: sort & categorize requirements

5

30.04.15

CATEGORY - Test-Procedure

11

30.04.15

ToDo: Test documentation equipment

camera, video,

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v4.2

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About EFS

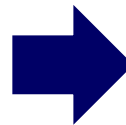
e-mail

home

The ToDo-List | Remaining Unfinished Tasks.

- ▶ filter: e.g. tasks per category | here: „offer“
- ▶ summarizing remaining unfinished tasks

New Row		tel	mom	UF	M	Cust	
Category	Event	=> Access Files					
EFS v4.2.072, (c) 2004 - 2015, AU							
Filter Reset		Search Keyword [f]		add. Keyword [b]		=> Access Files [w]	
				in Column [e]		<	
No	Date	Tasks		Add.			
A		i		> Close ToDo			
1	30.04.15	CATEGORY - Offer					
9	30.04.15	ToDo:	offer check with project manager	Offer version t.b. customer			
7	30.04.15	ToDo:	check prices with procurement dpt.	especially special			
4	30.04.15	Done:	organize drawings	[ok, 150517]			
3	30.04.15	ToDo:	sort & categorize requirements				
2	30.04.15	Done:	collect requirements	[ok, 150430] customer asking process and frict			
Excel Filing System (EFS) developed by Andreas Ulkan.							



New Row		tel	mom	UF	M	Cust	
Category	Event	=> Access Files					
EFS v4.2.X72, (c) 2004 - 2015, AU							
Filter Reset		Search Keyword [f]		add. Keyword [b] in Column [e]		=> Access Files [w]	
No	Date	Tasks		Add.			
A		i		> Close ToDo			
1	30.04.15	CATEGORY - Offer					
9	30.04.15	ToDo:	offer check with project manager				Offer version t.b. customer
7	30.04.15	ToDo:	check prices with procurement dpt.				especially special
3	30.04.15	ToDo:	sort & categorize requirements				
Excel Filing System (EFS) developed by Andreas Ulkan.							
v4.2 (c) 2004 - 2015, AU		About EFS	e-mail	home			

The ToDo-List | Print View.

- pre-defined print layout | pdf or paper

Customer Project										
sorted: column "CAT"										
No	Date	Tasks	Add	Content	Remarks	with	till	CAT	F	X
1	30.04.15	CATEGORY - Offer				C		Offer		
9	30.04.15	ToDo: offer check with project manager		Offer version t.b. checked upfront sending to customer	technical solution must be waterproof	Thomas	14.05.2015	Offer	X	
7	30.04.15	ToDo: check prices with procurement dpt		especially special hydraulic cylinders stroke 4.5m		Jennifer	12.05.2015	Offer	X	
4	30.04.15	Done: organize drawings	(sk. 18.03.15)			Michael	07.05.2015	Offer	X	
3	30.04.15	ToDo: sort & categorize requirements					05.05.2015	Offer	X	
2	30.04.15	Done: collect requirements	(sk. 18.04.20)	customer asking for functional proof for jack h.p process and friction test	clear matrix required for colleagues!		28.04.2015	Offer	X	
5	30.04.15	CATEGORY - Test-Procedure				C		Test-Procedure		
11	30.04.15	ToDo: Test documentation equipment		camera, video,	check support by R&D dept.	Stefan	01.06.2015	Test-Procedure	X	
10	30.04.15	Done: define test scenario equipment	(sk. 18.04.20)	mechanical preparation, test material.	already talked to Stefan. Should work. (30.04.2015)	Stefan	20.05.2015	Test-Procedure	X	
8	30.04.15	Done: drawings for functional test	(sk. 18.03.15)	refer to sketch from customer, e-mail dd. 17.04.2015	discussed e-mail w/Michael. (28.04.2015)	Michael	12.05.2015	Test-Procedure	X	
6	30.04.15	Done: design of functional test	(sk. 18.04.20)	with customer! -> agreement upfront needed!				Test-Procedure	X	

The ToDo-List | Other Functions.

- ▶ all other functions fully integrated
 - ▶ Search 4
 - ▶ Cat 5
 - ▶ Sort 2
 - ▶ SortbySearch
 - ▶ Doc N
 - ▶ DirectFile | TopicFile | LogBook
 - ▶ MemoFiles | UserForm
 - ▶ etc.

New Row

telmomUF

M

Category

Event

=> Access Files

EFS v4.2.X72, (c) 2004 - 2015, AU

Filter Reset

Search Keyword [f]

add. Keyword [b]

in Column [e]

=> Acc

No

Date

▼

▼

Tasks

◀▶

Add.

A

■

■

■

■

i

> Close ToDo

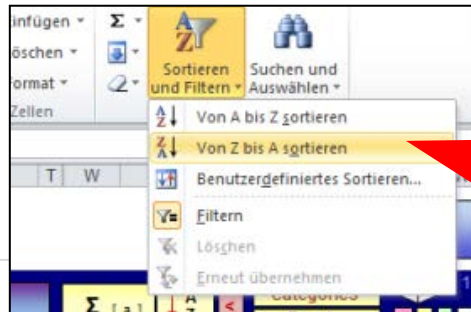
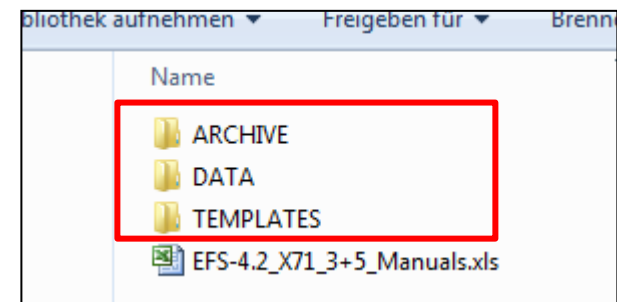
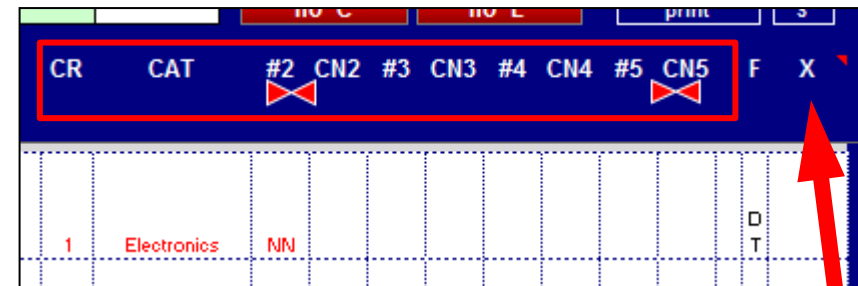
1	30.04.15		CATEGORY - Offer	
9	30.04.15	ToDo:	offer check with project manager	Offer ver custom
7	30.04.15	ToDo:	check prices with procurement dpt.	especia
4	30.04.15	Done:	organize drawings	[ok, 150517]
3	30.04.15	ToDo:	sort & categorize requirements	
2	30.04.15	Done:	collect requirements	[ok, 150430] custom process

Agenda.

- ▶ Introduction & Key Elements
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- ▶ The ToDo-List
- ▶ **Don'ts**
- ▶ Examples

Don'ts.

- ▶ to re-name sheets
- ▶ to delete columns – better hide them
- ▶ to disrupt order of project number columns („HCR1 ... HCN5“)
- ▶ to delete „NN“ in hidden column #2 (HCR2)
- ▶ to delete or to move last column „HDetails10“
- ▶ to delete or re-name system folders
- ▶ to use EXCEL standard sorting



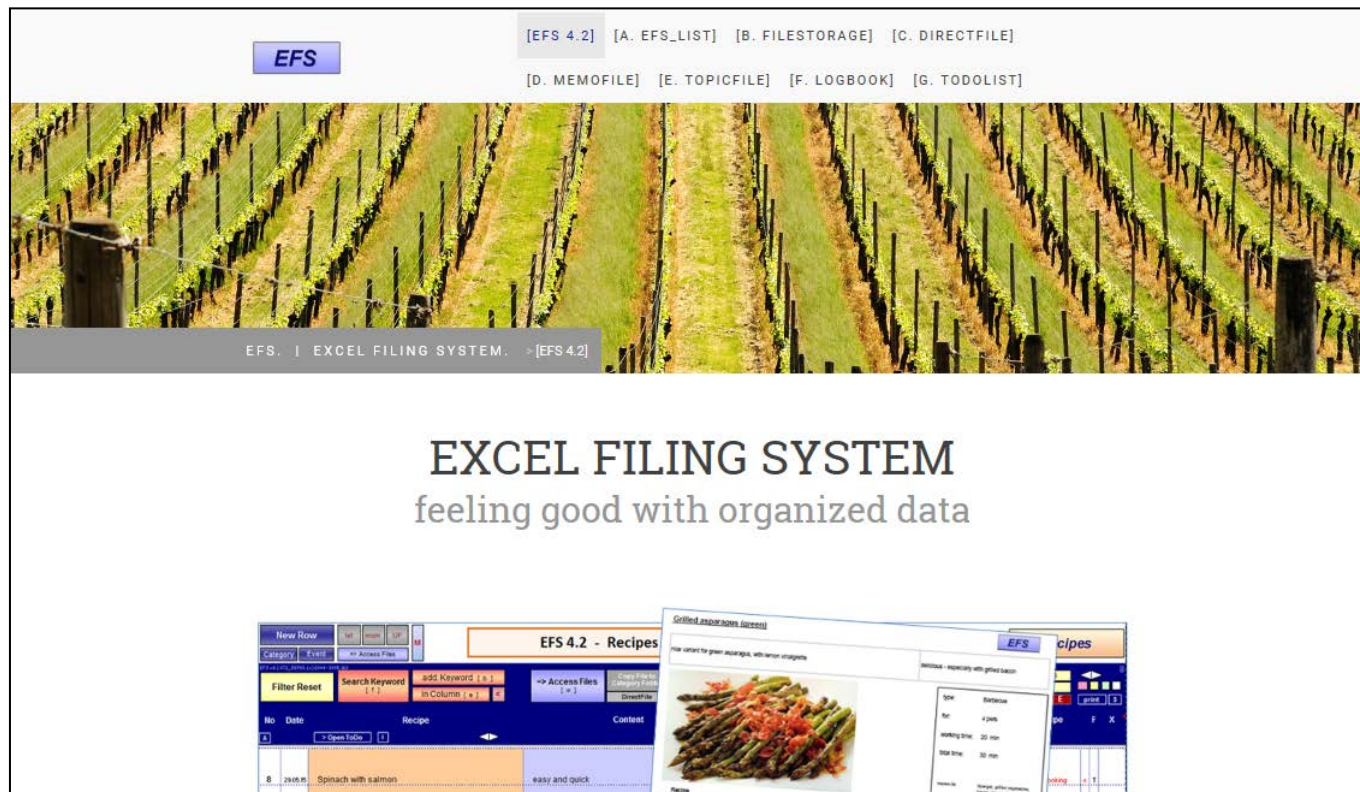
Agenda.

- ▶ Introduction & Key Elements
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- ▶ The List & DirectFiles
- ▶ The List & MemoFiles
- ▶ The List & TopicFiles
- ▶ The List & LogBooks
- ▶ The ToDo-List
- ▶ Don'ts
- ▶ **Examples**

Examples.

- ▶ examples and further information, templates and downloads

... are available at: www.efs42.de



Thank you very much for your attention.



Andreas Ulkan.

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