

Custom Properties and Fast Search in Solid Edge ST9

This Tech Tip looks at using custom file properties in the Solid Edge built in data management.

Solid Edge ST9 added **Built-in Data Management** which directly integrates with Solid Edge and allows you to manage your documents. This data management tool is not an addition to other document management software like SharePoint or Teamcenter but stands on its own.

This **Built-in Data Management** captures file properties, prevents file and part number duplication, provides fast searching and where-used results. It supports Life Cycle Management as well as controlled distribution through cloud file services.

Custom Properties

Using custom properties helps you searching for specific files and organizing your data. It is good practice to use ...Program Files/Solid Edge ST9/Preferences/propseed.txt to add custom properties to Solid Edge files. Please read ST9 help and the comment lines in propseed.txt for more information about content and syntax.

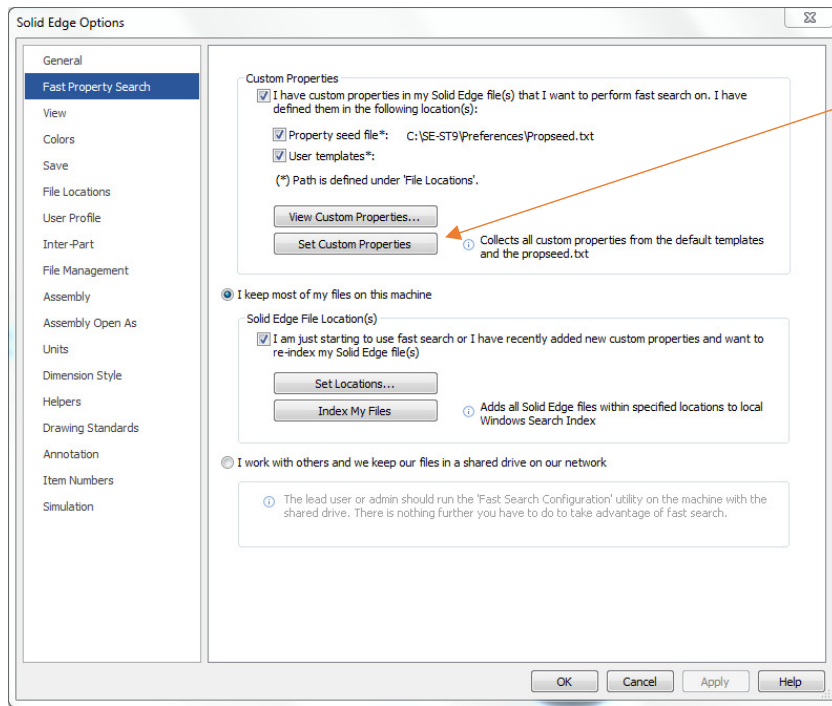
Example:

```
\\ Define custom properties          ...  
Begin Define Custom  
define finish;text;  
define Mfg Type;text;  
define Vendor;text;  
End Define Custom
```

```
\\ Contents of finish list  
Begin Finish  
gold;  
nickel;  
copper;  
default=nickel;  
End Finish
```

```
\\ Contents of Mfg Type list  
Begin Mfg Type  
Turned;  
Machined;  
Purchased;  
Assembled;  
Injected;  
Press Break;  
default=2;  
End Mfg Type
```

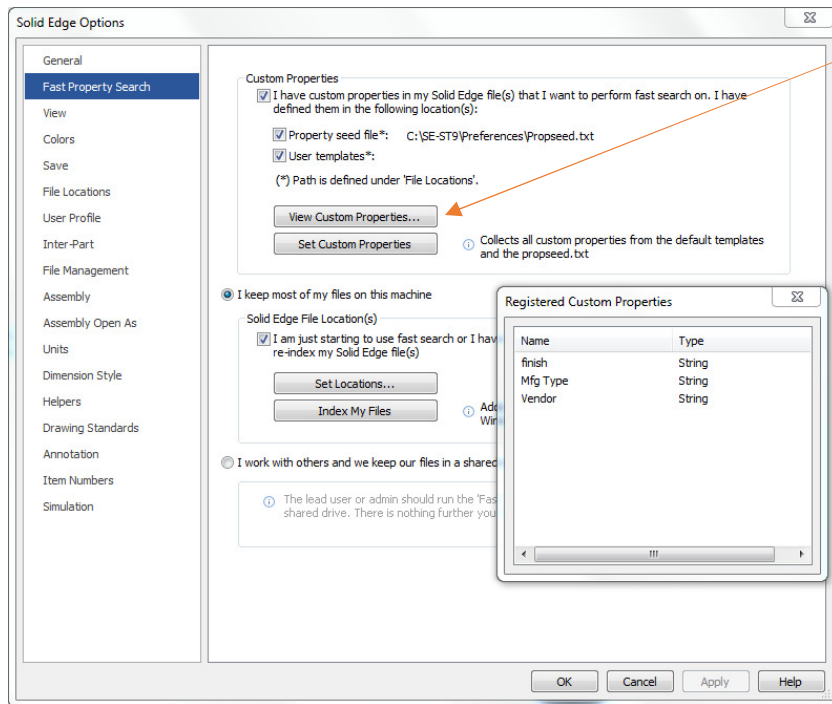
```
\\ Contents of Vendor list  
Begin Vendor  
ACME;  
CRATE & BROTHERS;  
INITEK;  
default=2;  
End Vendor
```



In the Solid Edge options on tab *Fast Property Search* make sure to set custom properties.

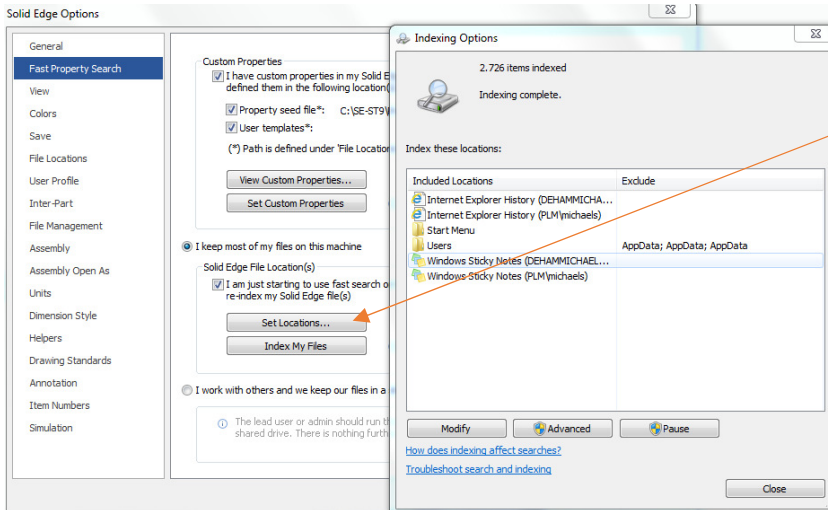
Note:

If your files are stored on a shared network drive the *Fast Search Configuration* wizard must be run on the machine with the shared network drive. You will find that wizard on the Solid Edge install disk.



You can *View Custom Properties* to verify all properties have been set for fast search.

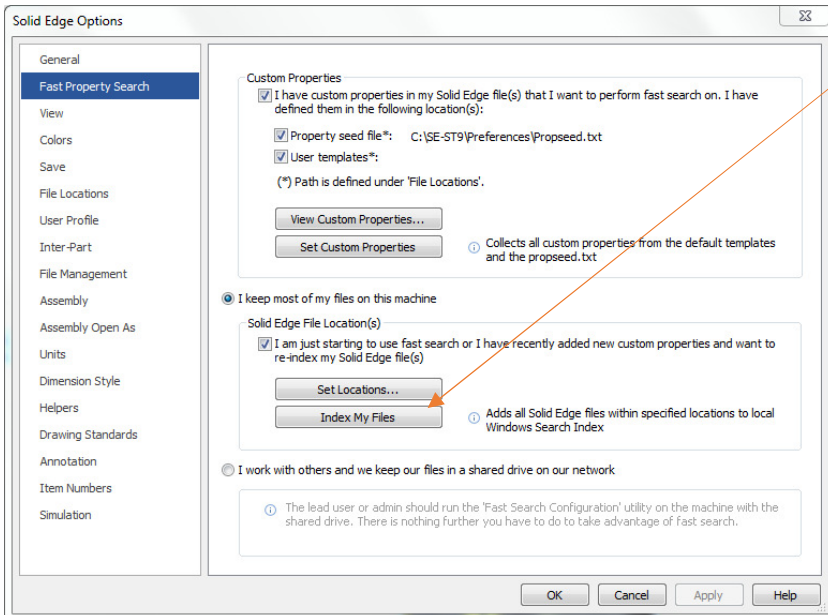
Indexing Files



For the properties to be used in fast search you need to index your files. First select the project folders you want to index.

Note:

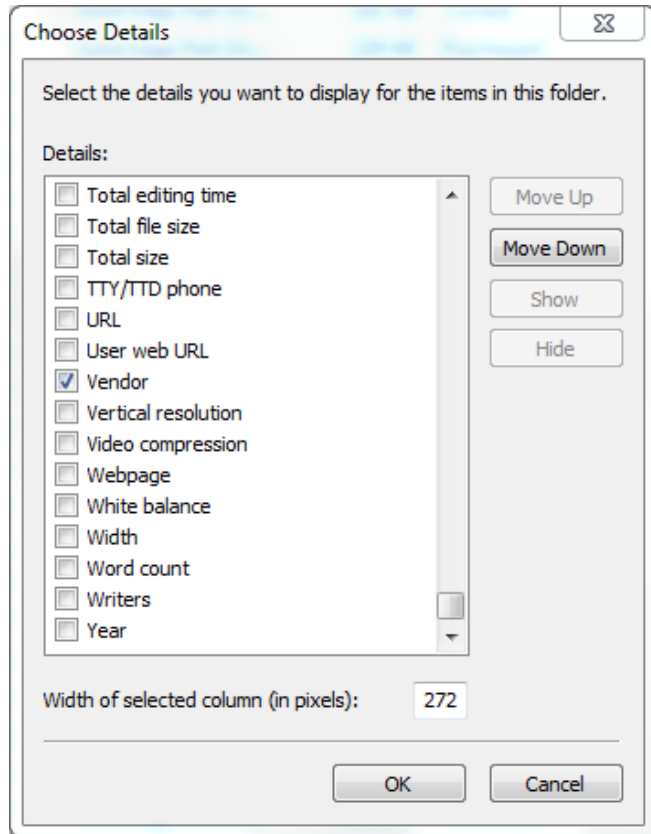
Folders remain indexed and update if files are removed or added. Select *Set Locations* and *Modify* to select your project folders.



Then click *Index my files*.

You can close this Menu. Indexing will proceed. In relation to the number of files this takes some time and does not impact your further work.

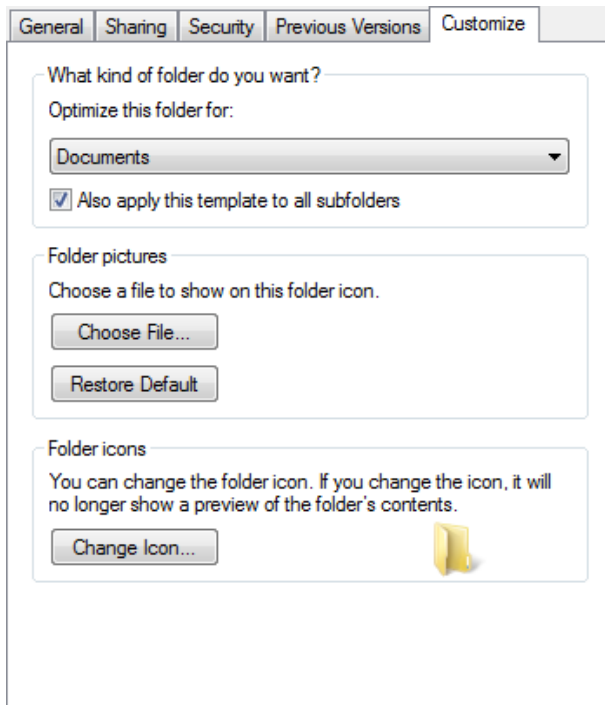
Windows Explorer



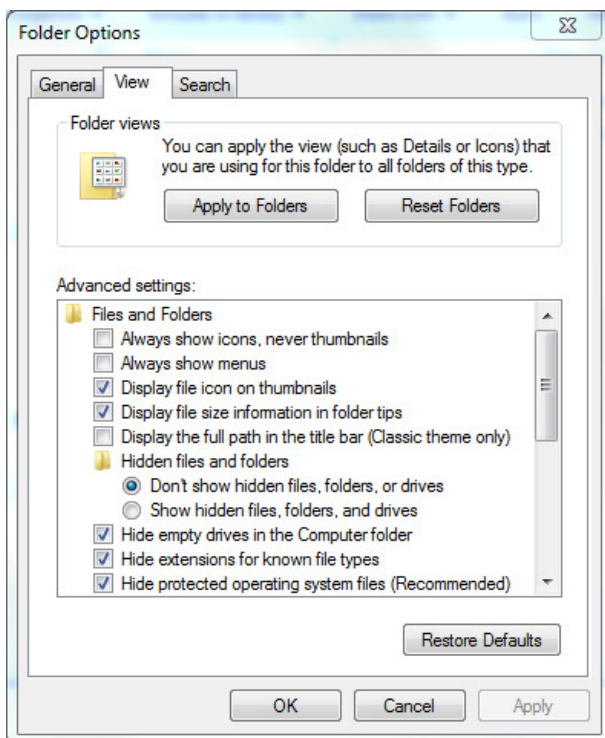
After indexing your files, custom properties can be shown in Windows Explorer.

In Windows Explorer right-mouse-click in any column header, click *more* and choose columns you want to display. In this example I select 'Mfg Type' and 'Vendor'.

Name	Mfg Type	Vendor	Date modified	Type	Size
ZX-0003_A	Assembled	ACME	14.04.2016 00:08	Solid Edge Assembly Document	184 KB
ZX-0003_A			05.08.2015 18:53	Solid Edge Assembly Configuration File	5 KB
ZX-0004_A	Assembled	ACME	14.04.2016 00:07	Solid Edge Assembly Document	185 KB
ZX-0004_A			07.03.2016 14:02	Solid Edge Assembly Configuration File	5 KB
ZX-0005_A	Assembled	ACME	14.04.2016 00:07	Solid Edge Assembly Document	187 KB
ZX-0005_A			07.03.2016 13:59	Solid Edge Assembly Configuration File	4 KB
ZX-0016_A	Injected	CRATE & BROTHERS	14.04.2016 00:07	Solid Edge Part Document	450 KB
ZX-0017_A	Injected	CRATE & BROTHERS	14.04.2016 00:07	Solid Edge Part Document	1.576 KB
ZX-0017_B	Injected		14.04.2016 00:07	Solid Edge Part Document	2.128 KB
ZX-0017_C	Injected		14.04.2016 00:07	Solid Edge Part Document	3.180 KB
ZX-0017_D	Injected		14.04.2016 00:07	Solid Edge Part Document	4.005 KB
ZX-0022_A	Injected		14.04.2016 00:07	Solid Edge Part Document	13.763 KB
ZX-0023_A	Purchased	ACME	14.04.2016 00:08	Solid Edge Part Document	884 KB
ZX-0025_A	Machined	ACME	14.04.2016 00:07	Solid Edge Part Document	167 KB
ZX-0027_A	Injected	CRATE & BROTHERS	14.04.2016 00:07	Solid Edge Part Document	1.589 KB

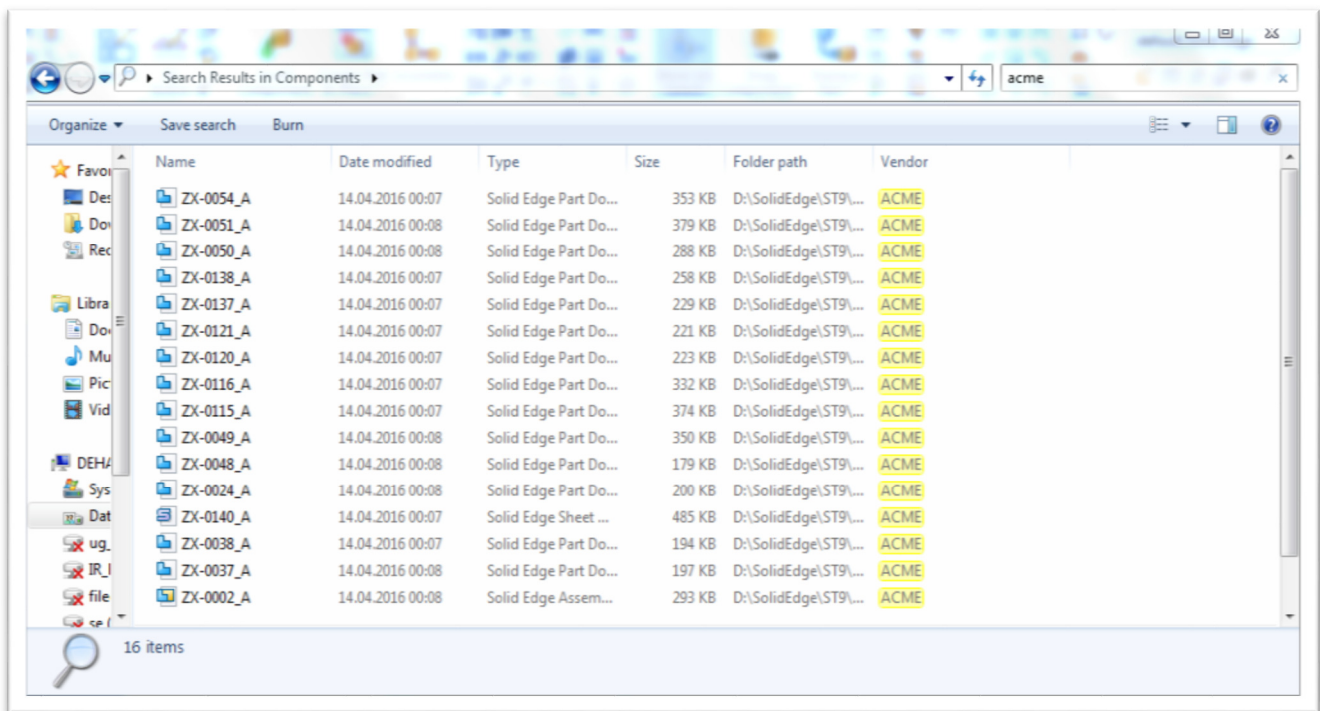
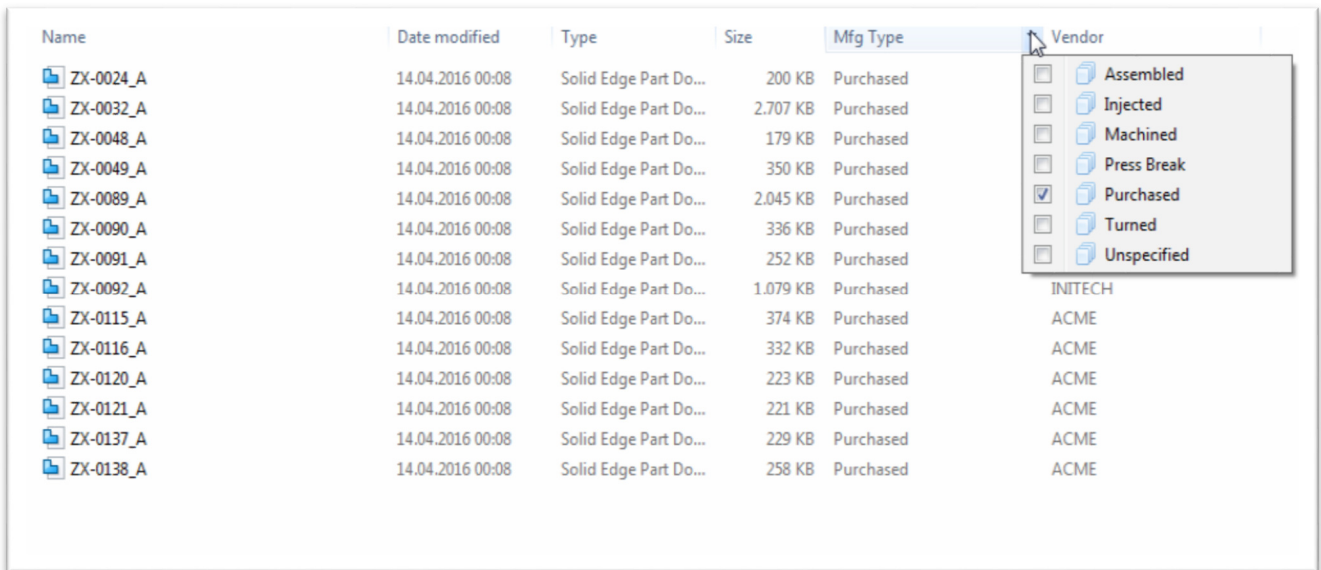


In order to see this view configuration in all your folders, right-mouse-click on this folder and select *Properties*. On the 'Customize' tab select *Optimize this folder for 'Documents'* and *Also apply this template to all subfolders*.



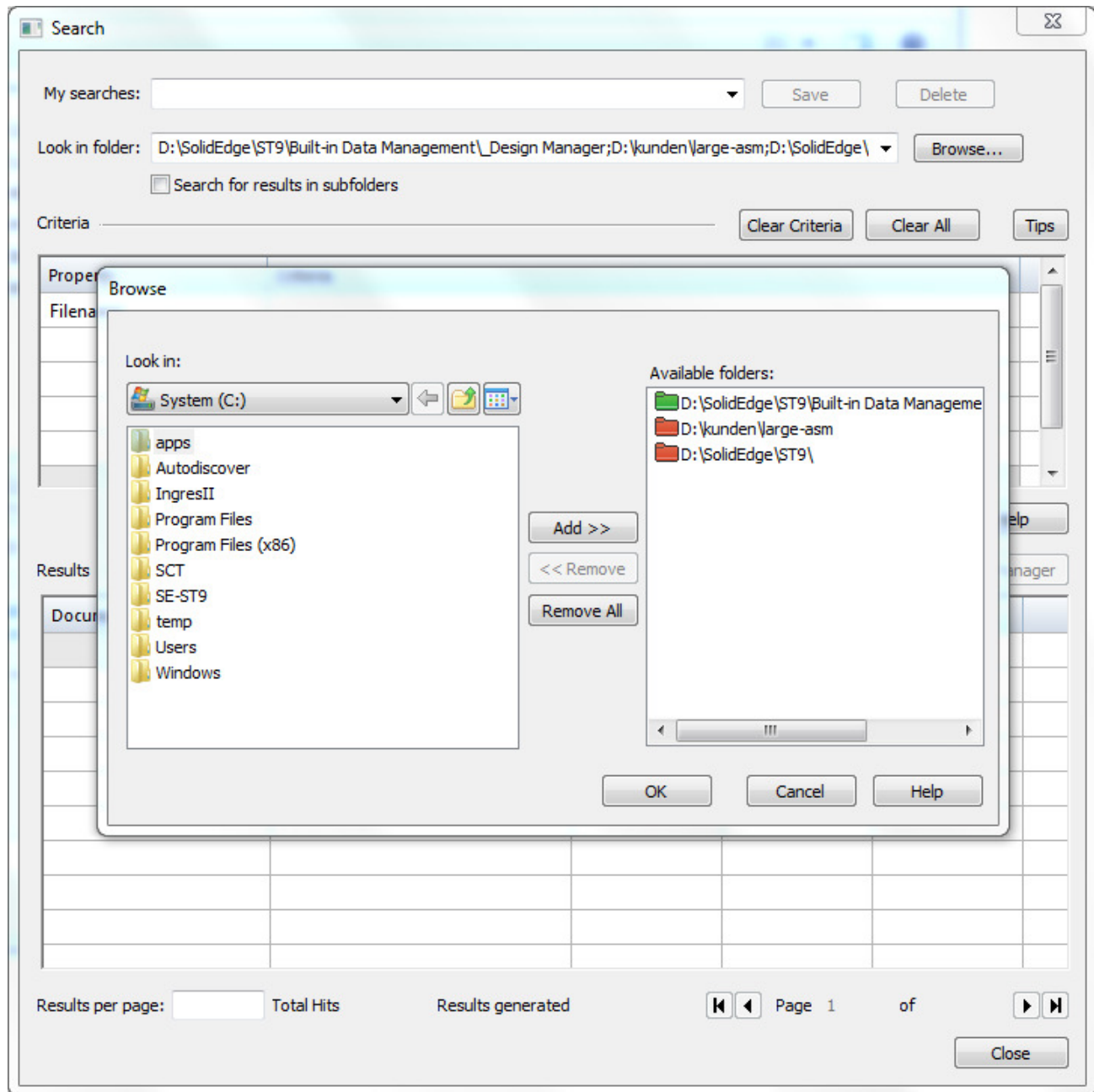
Now you can apply this view to all views of type 'Documents'. In Windows Explorer select *Organize, Folder and Search Option*. On the 'View' tab click *Apply to all Folders*.

This lets you sort, filter and search your data also by your custom properties in Windows Explorer.

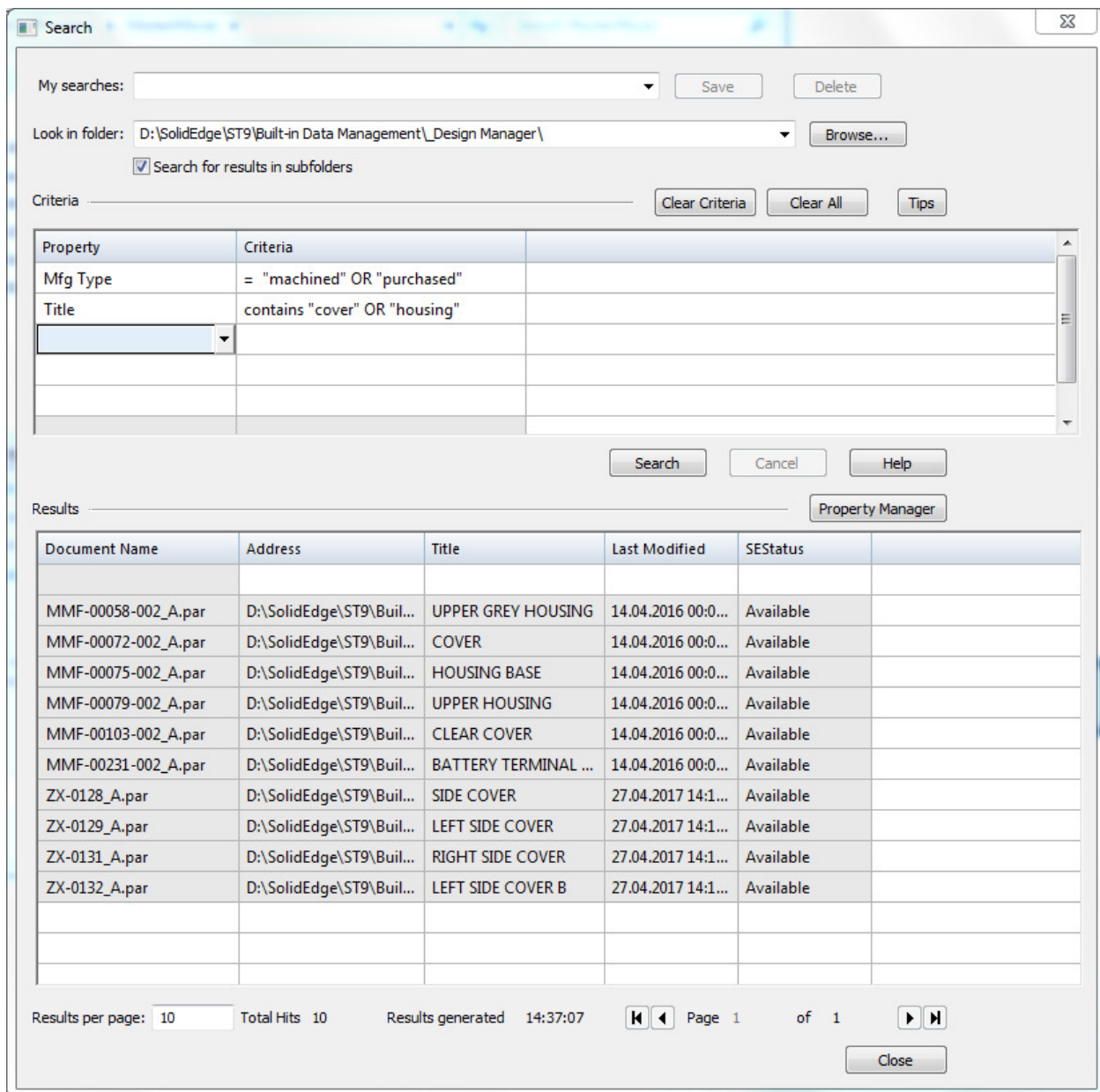


Fast Search in Solid Edge

In the Open file dialog click *Search*. If you browse for the folder to search in, colours indicate indexing. Green folders are indexed and ready for fast searching. Red folders are not indexed.



In the Search dialog select a property from the list and define the search criteria.



You can start *Property Manager* on the list of found files to see more properties to find and open the file you need.

