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.

Solid Edge Tips

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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;

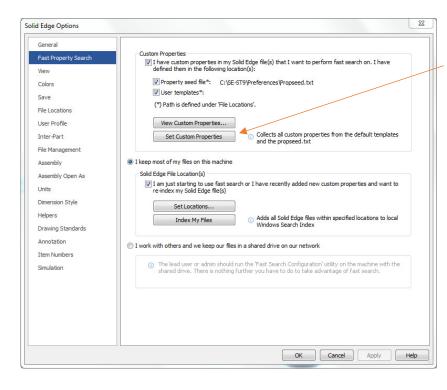
Injected;

Press Break;

default=2;

End Mfg Type

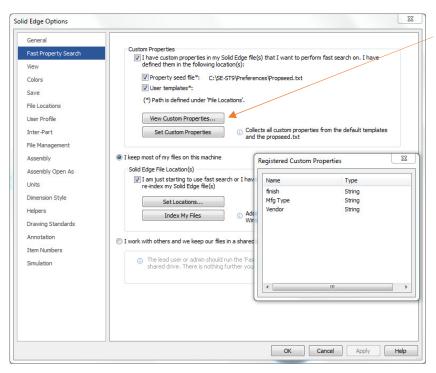
\\ Contents of Vendor list
Begin Vendor
ACME;
CRATE & BROTHERS;
INITEK;
default=2;
End Vendor



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.

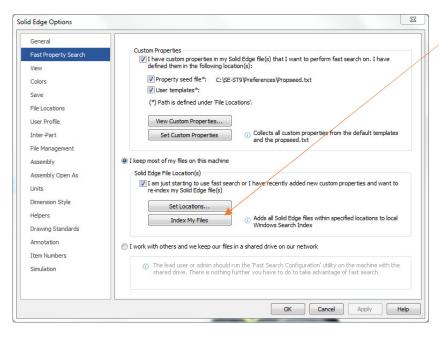
Indexing Files

| General | | lndexing Options | | 2 |
|----------------------|---|---|---------------------------|-------|
| Fast Property Search | Custom Properties I have custom properties in my Solid E defined them in the following location | 2.726 items indexed | | |
| View | | Indexing complete. | | |
| Colors | Property seed file*: C:\SE-ST9\ | | | |
| Save | User templates*: | | | |
| File Locations | (*) Path is defined under 'File Location | Index these locations: | | |
| User Profile | View Custom Properties | Included Locations | Exclude | |
| Inter-Part | Set Custom Properties | Internet Explorer History (DEHAMMICHA Internet Explorer History (PLM\michaels) | | |
| File Management | | Start Menu | | |
| Assembly | I keep most of my files on this machine | Users Users | AppData; AppData; AppData | |
| Assembly Open As | Solid Edge File Location(s) | Windows Sticky Notes (DEHAMMICHAEL | | |
| Units | I am just starting to use fast search o re-index my Solid Edge file(s) | Windows-Sticky Notes (PLM (michaels) | | |
| Dimension Style | Set Locations | | | |
| Helpers | Index My Files | | | |
| Drawing Standards | MUCK Hy Hies | | | |
| Annotation | | | | |
| Item Numbers | I work with others and we keep our files in a | | | |
| Simulation | The lead user or admin should run the | Modify 💡 Advanced | Pause | |
| | shared drive. There is nothing furth | | Touse | |
| | | How does indexing affect searches? Troubleshoot search and indexing | | |
| | | Troubleshoot scorer and indexing | | Close |

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

| Choose Details | | 23 |
|---|--------------------------|--------|
| Select the details you want to display for the it | tems in this f | older. |
| Details: | | |
| Total editing time | Move | e Up |
| Total file size | | |
| Total size | Move | Down |
| TTY/TTD phone | Sho | w |
| | | |
| User web URL | Hic | le |
| Vendor | | |
| Video compression | | |
| Webpage | | |
| White balance | | |
| Width | | |
| Word count | | |
| Writers | | |
| Year . | - | |
| Width of selected column (in pixels): 27 | 2 | |
| ОК | Can | cel |

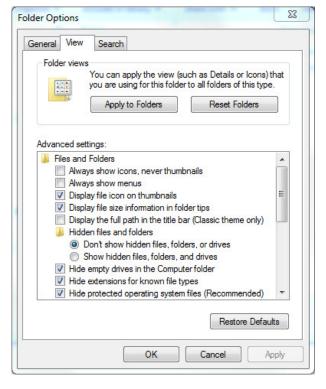
After indexing your files, custom properties can be shown in Windows Explorer.

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 | Туре | 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 | |
| L ZX-0017_B | Injected | | 14.04.2016 00:07 | Solid Edge Part Document | 2.128 KB | |
| L ZX-0017_C | Injected | | 14.04.2016 00:07 | Solid Edge Part Document | 3.180 KB | |
| 🔄 ZX-0017_D | | | 14.04.2016 00:07 | Solid Edge Part Document | 4.005 KB | |
| L 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 | |

| General | Sharing | Security | Previous Versions | Customize |
|---------|--------------|--------------|---|-----------|
| ⊂ What | kind of fol | der do you | want? | |
| | ize this fol | - | | |
| Deer | uments | | | _ |
| | | | | • |
| V A | so apply th | iis template | e to all subfolders | |
| Folde | r pictures - | | | |
| Choo | se a file to | show on th | his folder icon. | |
| C | hoose File. |] | | |
| Re | store Defa | ult | | |
| Folde | ricons | | | |
| | | | ricon. If you change of the folder's conte | |
| Ch | ange Icon |] | | |
| | | | | |
| | | | | |
| | | | | |

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.

| Name | Date modified | Туре | Size | Mfg Type | Vendor |
|-------------|------------------|--------------------|----------|-----------|-------------|
| 🖕 ZX-0024_A | 14.04.2016 00:08 | Solid Edge Part Do | 200 KB | Purchased | Assembled |
| 🖕 ZX-0032_A | 14.04.2016 00:08 | Solid Edge Part Do | 2.707 KB | Purchased | Injected |
| 🖕 ZX-0048_A | 14.04.2016 00:08 | Solid Edge Part Do | 179 KB | Purchased | Machined |
| 늘 ZX-0049_A | 14.04.2016 00:08 | Solid Edge Part Do | 350 KB | Purchased | Press Break |
| 🕒 ZX-0089_A | 14.04.2016 00:08 | Solid Edge Part Do | 2.045 KB | Purchased | Purchased |
| 🕒 ZX-0090_A | 14.04.2016 00:08 | Solid Edge Part Do | 336 KB | Purchased | 🔲 🧊 Turned |
| 🖕 ZX-0091_A | 14.04.2016 00:08 | Solid Edge Part Do | 252 KB | Purchased | Unspecified |
| L ZX-0092_A | 14.04.2016 00:08 | Solid Edge Part Do | 1.079 KB | Purchased | INITECH |
| 🖕 ZX-0115_A | 14.04.2016 00:08 | Solid Edge Part Do | 374 KB | Purchased | ACME |
| 🖕 ZX-0116_A | 14.04.2016 00:08 | Solid Edge Part Do | 332 KB | Purchased | ACME |
| 🖕 ZX-0120_A | 14.04.2016 00:08 | Solid Edge Part Do | 223 KB | Purchased | ACME |
| 🖕 ZX-0121_A | 14.04.2016 00:08 | Solid Edge Part Do | 221 KB | Purchased | ACME |
| 🖕 ZX-0137_A | 14.04.2016 00:08 | Solid Edge Part Do | 229 KB | Purchased | ACME |
| L ZX-0138_A | 14.04.2016 00:08 | Solid Edge Part Do | 258 KB | Purchased | ACME |

| Organize 🔻 | Save search Burn | | | | | | ≡ • 🔟 (|
|------------|------------------|------------------|--------------------|--------|-------------------|--------|---------|
| 🔶 Favoi | Name | Date modified | Туре | Size | Folder path | Vendor | |
| E Des | 🕒 ZX-0054_A | 14.04.2016 00:07 | Solid Edge Part Do | 353 KB | D:\SolidEdge\ST9\ | ACME | |
| 🐌 Dov | 🕒 ZX-0051_A | 14.04.2016 00:08 | Solid Edge Part Do | 379 KB | D:\SolidEdge\ST9\ | ACME | |
| 📜 Rec | 🐚 ZX-0050_A | 14.04.2016 00:08 | Solid Edge Part Do | 288 KB | D:\SolidEdge\ST9\ | ACME | |
| | 🔄 ZX-0138_A | 14.04.2016 00:07 | Solid Edge Part Do | 258 KB | D:\SolidEdge\ST9\ | ACME | |
| 📜 Libra | 🔄 ZX-0137_A | 14.04.2016 00:07 | Solid Edge Part Do | 229 KB | D:\SolidEdge\ST9\ | ACME | |
| 🖹 Do 🇮 | 🐚 ZX-0121_A | 14.04.2016 00:07 | Solid Edge Part Do | 221 KB | D:\SolidEdge\ST9\ | ACME | |
| að Mu | 🐚 ZX-0120_A | 14.04.2016 00:07 | Solid Edge Part Do | 223 KB | D:\SolidEdge\ST9\ | ACME | |
| 📔 Pic | 🐚 ZX-0116_A | 14.04.2016 00:07 | Solid Edge Part Do | 332 KB | D:\SolidEdge\ST9\ | ACME | |
| 😸 Vid | 🕒 ZX-0115_A | 14.04.2016 00:07 | Solid Edge Part Do | 374 KB | D:\SolidEdge\ST9\ | ACME | |
| | 🐚 ZX-0049_A | 14.04.2016 00:08 | Solid Edge Part Do | 350 KB | D:\SolidEdge\ST9\ | ACME | |
| 🖳 DEH4 | 🐚 ZX-0048_A | 14.04.2016 00:08 | Solid Edge Part Do | 179 KB | D:\SolidEdge\ST9\ | ACME | |
| 🏜 Sys | 🐚 ZX-0024_A | 14.04.2016 00:08 | Solid Edge Part Do | 200 KB | D:\SolidEdge\ST9\ | ACME | |
| 渡 Dat | 🗐 ZX-0140_A | 14.04.2016 00:07 | Solid Edge Sheet | 485 KB | D:\SolidEdge\ST9\ | ACME | |
| 🙀 ug_ | 🐚 ZX-0038_A | 14.04.2016 00:07 | Solid Edge Part Do | 194 KB | D:\SolidEdge\ST9\ | ACME | |
| 👷 IR_I | 🐚 ZX-0037_A | 14.04.2016 00:08 | Solid Edge Part Do | 197 KB | D:\SolidEdge\ST9\ | ACME | |
| file | 国 ZX-0002_A | 14.04.2016 00:08 | Solid Edge Assem | 293 KB | D:\SolidEdge\ST9\ | ACME | |
| 😡 se (🍸 | | | | | | | |

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.

| Search | X |
|-----------------|--|
| My searches: | ▼ Save Delete |
| Look in folder: | D:\SolidEdge\ST9\Built-in Data Management_Design Manager;D:\kunden\Jarge-asm;D:\SolidEdge\ 👻 Browse |
| | Search for results in subfolders |
| Criteria | Clear Criteria Clear All Tips |
| Proper Brow | rse |
| Filena | |
| | Available folders: |
| | System (C:) |
| | apps Autodiscover |
| ' 🍹 | IngresII |
| | Program Files Add >> Program Files (x86) |
| Results | SCT < <remove nager<="" td=""></remove> |
| Docur | SE-ST9 Remove All |
| | Users Windows |
| | windows |
| | |
| | OK Cancel Help |
| | |
| | |
| | |
| | |
| Results per pag | ge: Total Hits Results generated H Page 1 of H |
| | Close |

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

| ly searches: | | | ▼ Save | Delete | |
|---|---|--|---|---|------------|
| ok in folder: D:\SolidEdge | ST9\Built-in Data Management | _Design Manager \ | | - Brows | e |
| Search for | results in subfolders | | | | |
| iteria | | | Clear Criter | ia Clear All | Tips |
| Property | Criteria | | | | |
| Mfg Type | = "machined" OR "purch | ased" | | | |
| Title | contains "cover" OR "hou | ising" | | | |
| | • | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | Search | Cancel | Help |
| sults | | | | Propert | ty Manager |
| | | | | | |
| | | | | | |
| Document Name | Address | Title | Last Modified | SEStatus | |
| Document Name | | | | SEStatus | |
| Document Name MMF-00058-002_A.par | D:\SolidEdge\ST9\Buil | UPPER GREY HOUSING | 14.04.2016 00:0 | SEStatus Available | |
| Document Name MMF-00058-002_A.par MMF-00072-002_A.par | D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil | UPPER GREY HOUSING | 14.04.2016 00:0 14.04.2016 00:0 | SEStatus Available Available | |
| Document Name MMF-00058-002_A.par MMF-00072-002_A.par MMF-00075-002_A.par | D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil | UPPER GREY HOUSING COVER HOUSING BASE | 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 | SEStatus Available Available Available | |
| MMF-00058-002_A.par MMF-00072-002_A.par MMF-00075-002_A.par MMF-00079-002_A.par | D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil | UPPER GREY HOUSING COVER HOUSING BASE UPPER HOUSING | 14.04.2016 00:0 14.04.2016 00:0 | SEStatus Available Available | |
| Document Name MMF-00058-002_A.par MMF-00072-002_A.par MMF-00075-002_A.par | D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil | UPPER GREY HOUSING COVER HOUSING BASE | 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 | SEStatus Available Available Available Available | |
| MMF-00058-002_A.par MMF-00072-002_A.par MMF-00075-002_A.par MMF-00079-002_A.par MMF-00103-002_A.par | D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil | UPPER GREY HOUSING COVER HOUSING BASE UPPER HOUSING CLEAR COVER | 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 | SEStatus Available Available Available Available Available | |
| MMF-00058-002_A.par MMF-00072-002_A.par MMF-00075-002_A.par MMF-00079-002_A.par MMF-00103-002_A.par MMF-00103-002_A.par | D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil | UPPER GREY HOUSING COVER HOUSING BASE UPPER HOUSING CLEAR COVER BATTERY TERMINAL | 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 | SEStatus Available Available Available Available Available Available | |
| MMF-00058-002_A.par MMF-00072-002_A.par MMF-00075-002_A.par MMF-00079-002_A.par MMF-00103-002_A.par MMF-00231-002_A.par ZX-0128_A.par | D:\SolidEdge\ST9\Buil | UPPER GREY HOUSING COVER HOUSING BASE UPPER HOUSING CLEAR COVER BATTERY TERMINAL SIDE COVER | 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 27.04.2017 14:1 | SEStatus Available Available Available Available Available Available Available | |
| Document Name MMF-00058-002_A.par MMF-00072-002_A.par MMF-00079-002_A.par MMF-00103-002_A.par MMF-00231-002_A.par ZX-0128_A.par ZX-0129_A.par | D:\SolidEdge\ST9\Buil | UPPER GREY HOUSING COVER HOUSING BASE UPPER HOUSING CLEAR COVER BATTERY TERMINAL SIDE COVER LEFT SIDE COVER | 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 27.04.2017 14:1 27.04.2017 14:1 | SEStatus Available Available Available Available Available Available Available Available | |
| Document Name MMF-00058-002_A.par MMF-00072-002_A.par MMF-00079-002_A.par MMF-00103-002_A.par MMF-00231-002_A.par ZX-0128_A.par ZX-0128_A.par ZX-0129_A.par | D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil | UPPER GREY HOUSING COVER HOUSING BASE UPPER HOUSING CLEAR COVER BATTERY TERMINAL SIDE COVER LEFT SIDE COVER RIGHT SIDE COVER | 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 27.04.2017 14:1 27.04.2017 14:1 27.04.2017 14:1 | SEStatus Available Available Available Available Available Available Available Available Available | |
| Document Name MMF-00058-002_A.par MMF-00072-002_A.par MMF-00079-002_A.par MMF-00103-002_A.par MMF-00231-002_A.par ZX-0128_A.par ZX-0128_A.par ZX-0129_A.par | D:\SolidEdge\ST9\Buil D:\SolidEdge\ST9\Buil | UPPER GREY HOUSING COVER HOUSING BASE UPPER HOUSING CLEAR COVER BATTERY TERMINAL SIDE COVER LEFT SIDE COVER RIGHT SIDE COVER | 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 14.04.2016 00:0 27.04.2017 14:1 27.04.2017 14:1 27.04.2017 14:1 | SEStatus Available Available Available Available Available Available Available Available Available | |

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

| s of type: Files (*.*) | | No levels BOM view | | | | | | |
|---------------------------|---------------------|-------------------------|-----------------|----------|--------------|-----------|--------------------------|-----------|
| Document Name | Last Save Date | Title | Document Number | Revision | Project Name | SEStatus | File Type | Mfg 🛆 |
| 🔄 ZX-0128_A.par | 04.03.2016 21:53:38 | SIDE COVER | ZX-0128 | Α | ZUMEX JUICER | Available | Solid Edge Part Document | Machined |
| 📮 ZX-0129_A.par | 04.03.2016 21:54:28 | LEFT SIDE COVER | ZX-0129 | Α | ZUMEX JUICER | Available | Solid Edge Part Document | Machined |
| MMF-00058-002_A.par | 25.06.2015 17:57:11 | UPPER GREY HOUSING | MMF-00058-002 | А | Master Mover | Available | Solid Edge Part Document | Purchased |
| MMF-00072-002_A.par | 15.06.2015 15:04:41 | COVER | MMF-00072-002 | A | Master Mover | Available | Solid Edge Part Document | Purchased |
| MMF-00075-002_A.par | 23.06.2015 18:56:25 | HOUSING BASE | MMF-00075-002 | Α | Master Mover | Available | Solid Edge Part Document | Purchased |
| MMF-00079-002_A.par | 23.06.2015 18:55:21 | UPPER HOUSING | MMF-00079-002 | Α | Master Mover | Available | Solid Edge Part Document | Purchased |
| MMF-00103-002_A.par | 26.06.2015 20:57:06 | CLEAR COVER | MMF-00103-002 | Α | Master Mover | Available | Solid Edge Part Document | Purchased |
| MMF-00231-002_A.par | 15.06.2015 14:57:36 | BATTERY TERMINAL COVER | MMF-00231-002 | A | Master Mover | Available | Solid Edge Part Document | Purchased |
| 📮 ZX-0131_A.par | 05.08.2015 18:46:37 | RIGHT SIDE COVER | ZX-0131 | А | ZUMEX JUICER | Available | Solid Edge Part Document | Purchased |
| 📮 ZX-0132_A.par | 23.03.2016 17:53:58 | LEFT SIDE COVER B | ZX-0132 | А | ZUMEX JUICER | Available | Solid Edge Part Document | Purchased |
| | | | | | | | | |
| | | | | | | | | |