CAD EFFICIENCY SOLUTIONS

FILE MANAGER

PRODUCT MANUAL

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NOTES BEFORE YOU GET STARTED

- Anything done in CES File Manager, whether it's changing the name, adding categories, values, etc, does **NOT** affect any of your files outside of CES File Manager.
- Saved library files (files with the .ces extension) do not contain any of the data contained in the files themselves (example: if you have a text file in the library, the only data saved in the library file is the data the user inputs into the library).
- Having over thousands files in a single folder may slow down CES File Manager when scrolling. It is advised to use good file organization practices to ensure that CES File Manager runs smoothly.
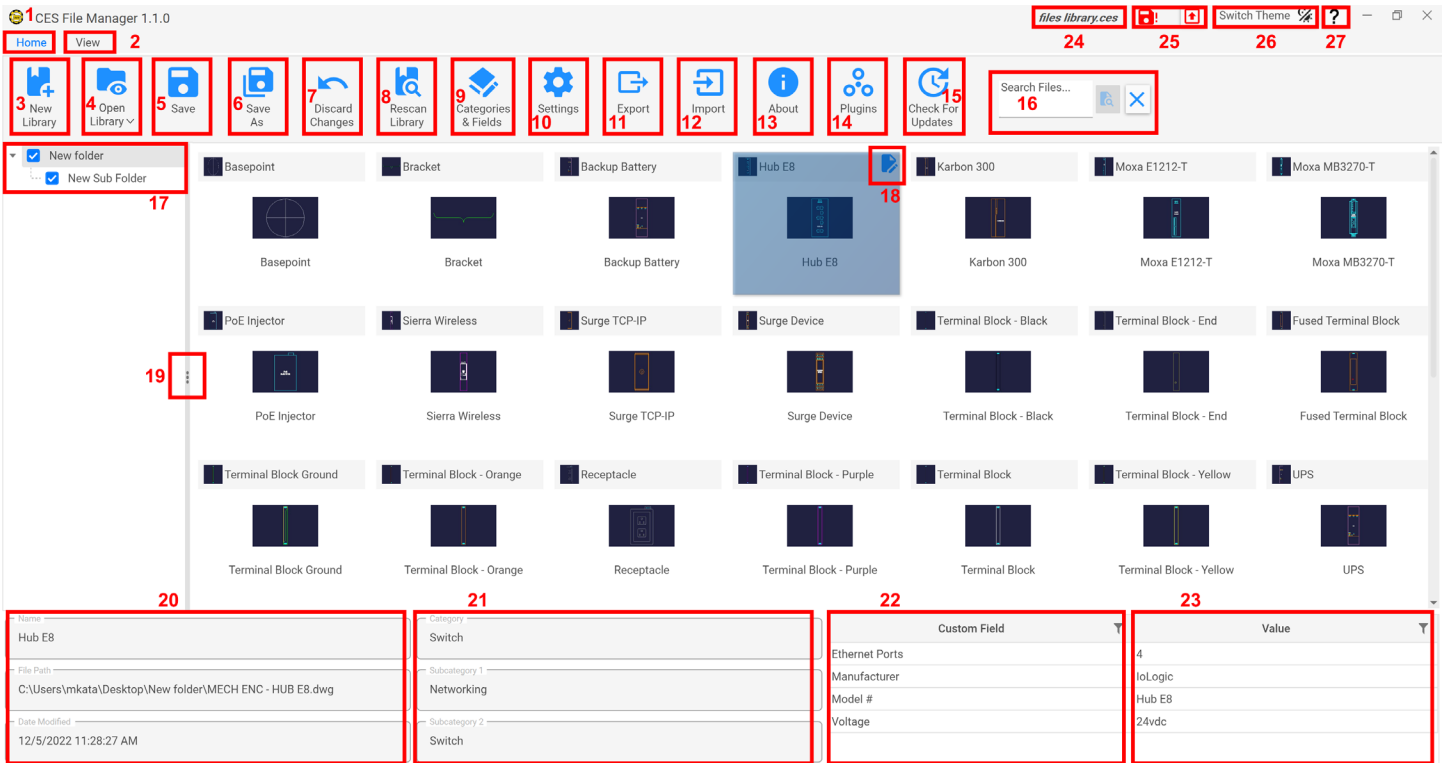
ACTIVATING YOUR LICENSE

- To activate your license (whether it's a trial license or a full license), a pop-up will appear during the initial startup of CES File manager
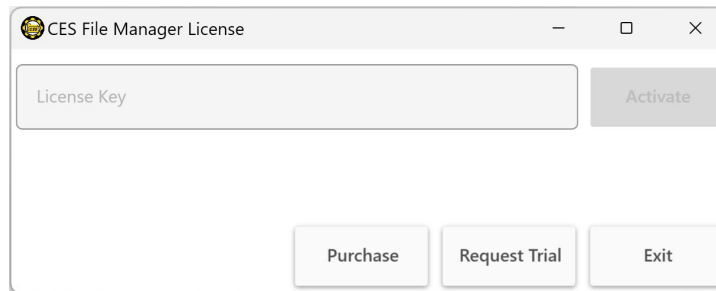
- Type in your license key in order to activate it.
- If you haven't purchased a license, or want to sign up for a trial, click the button "Purchase" or "Request Trial".

MAIN SCREEN OVERVIEW

Key

1 – Home Tab
2 – View Tab
3 – Create a New Library
4 – Open Library
5 – Save Button
6 – Save As Button
7 – Discard Changes Button
8 – Rescan Library Button
9 – Edit Categories & Fields

10 – Settings Button
11 – Export Library Button
12 – Import Library Button
13 – About App Button
14 – Optional Plugins Button
15 – Check for App Updates Button
16 – Search Area
17 – Folder Structure Area
18 – Edit File Attributes Button

19 – Expand/Retract Folder Area
20 – File Information
21 – File Categories
22 – Field Attribute Names
23 – Field Attribute Values
24 – Library Name
25 – Status Icons
26 – Dark/Light Mode Button
27 – Help

Status Icons

 Changes have been made to the file that aren't saved yet.

 Manual Update Button. Click this to manually update the application.

FILE EDITING SCREEN OVERVIEW

Key

1 – File Display Name   4 – Open File Location Button   7 – Add Field
2 – File Location   5 – File Categories   8 – File Fields and Attributes
3 – Date File was Modified   6 – Open File Button

CREATING A NEW LIBRARY

- To create a new library, click on the icon in the home ribbon.
- When clicked, you will be prompted to select the folder that contains the files you wish to display in the library.
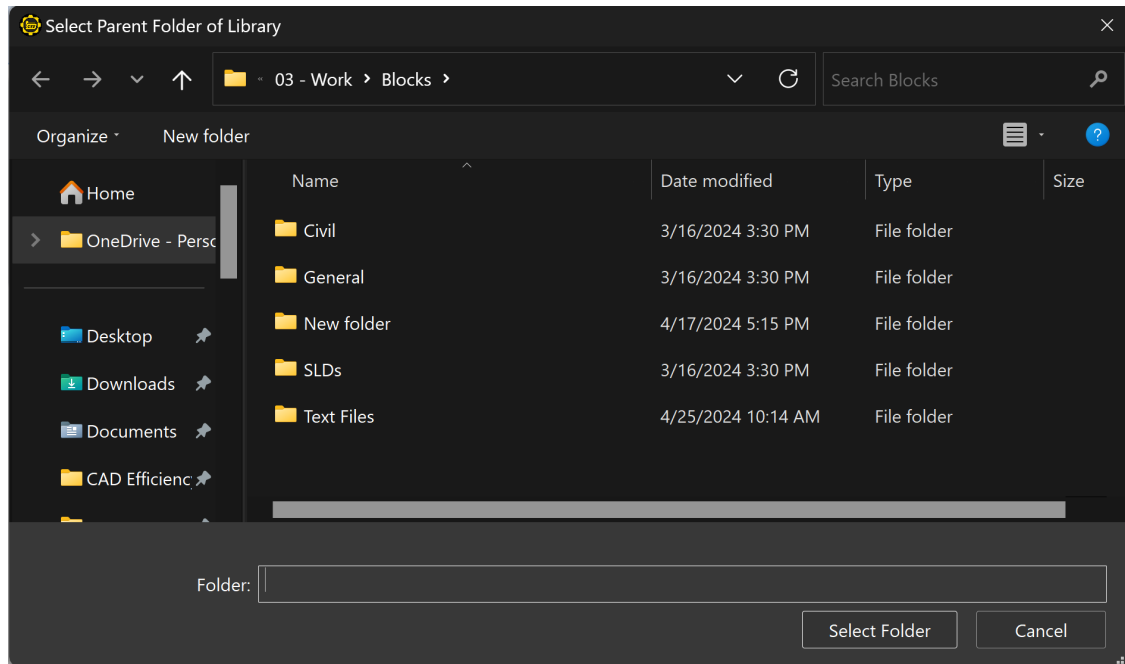
- Click on the folder you wish to use, then click select folder.
- The files contained in the folder, with the extensions specified in the settings menu, will now be displayed in the library.
  - The default file types displayed are .dwg and .dwt. See the section ADDING/CHANGING FILE EXTENSIONS IN THE LIBRARY to change to change this.

OPENING AN EXISTING LIBRARY
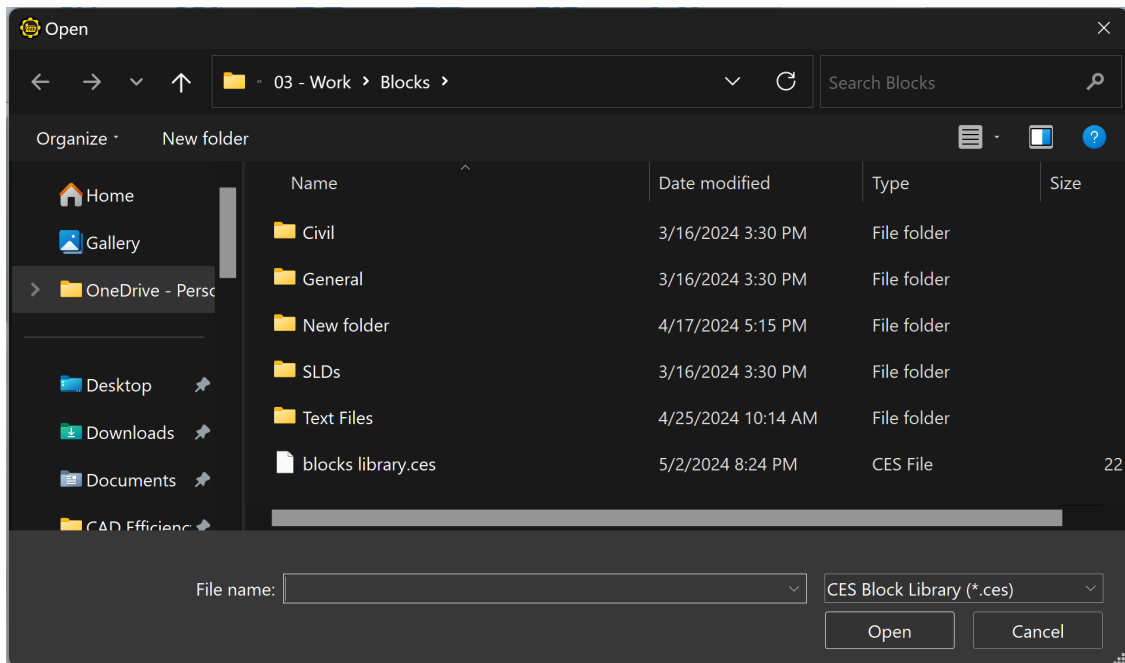

- To open an existing library, click on the icon.
- A dropdown menu will appear with previously opened libraries.
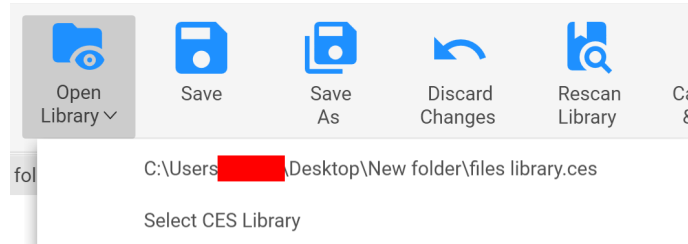
- Select a previously opened library, or to open a different one, click on "Select CES Library".
- When you click on "Select CES Library" a pop-up window will appear to find and select the library to open.
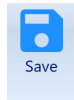

- Once selected, click open to open the library.

SAVING A LIBRARY

- To save your library, click on the icon.
    - ○ If the library you are using has previously been saved, no additional steps are needed.
    - ○ If the library you are using is new and has not been saved previously, a save window will appear. You may choose the location in which the file will be saved and what the library will be named.
        - ■ Click save once you have selected a location and named the file.
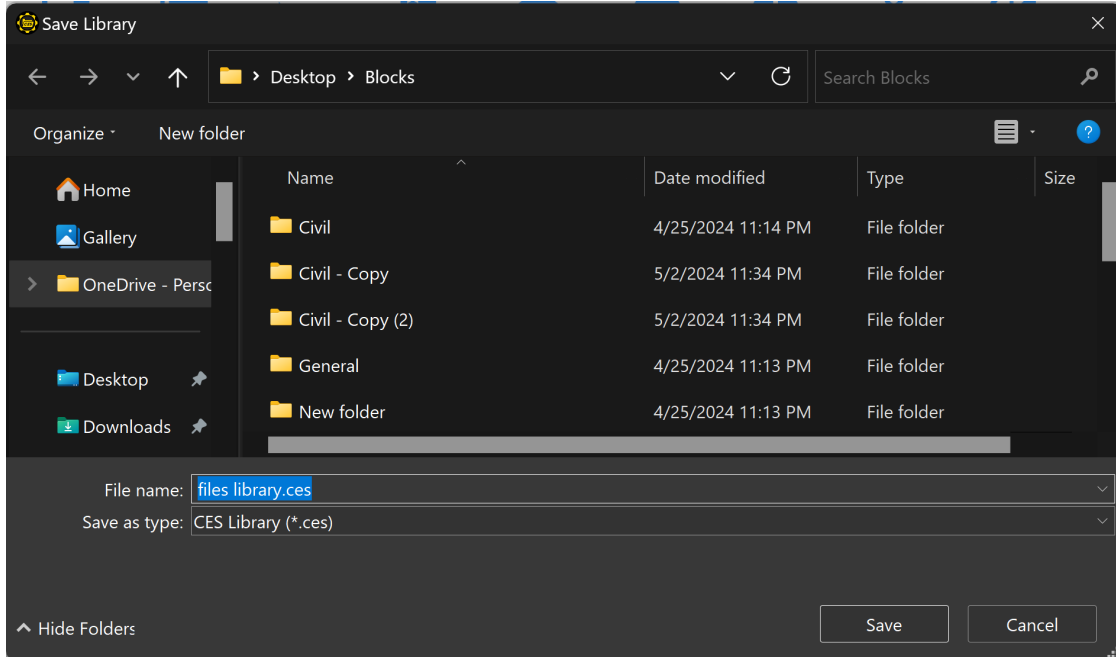
DISPLAY SETTINGS

- There are multiple display settings to suit your preferences

- To change how the files are shown, click on the [View] tab.
    - o You have the option to display the files as large icons or a list.
    - o Large Icons is the default view.
    - o To switch to List View, click the button for list view.

| Large Icons | List View |
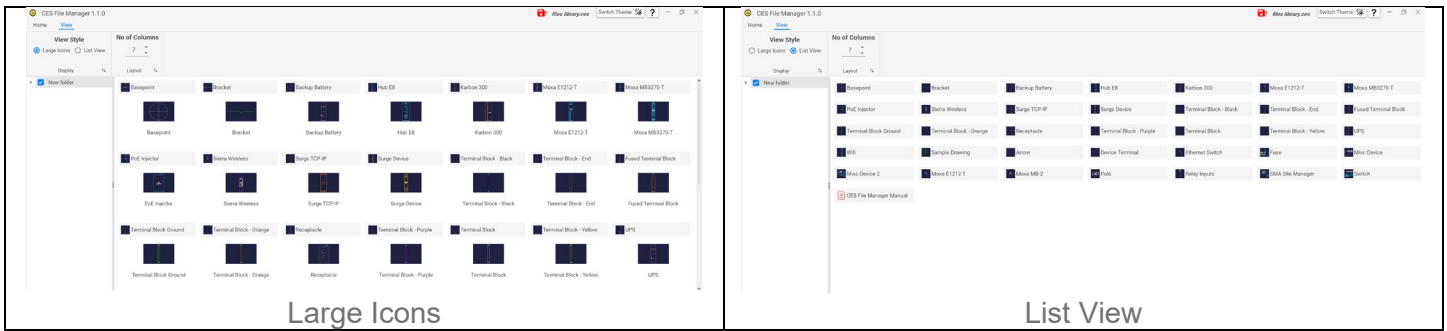
- Light mode is the default theme. To switch the display of CES File Manager between dark mode and light mode:
    - o click the [Switch Theme] button on the top right of the screen.
    - o This will swap between the dark and light theme.

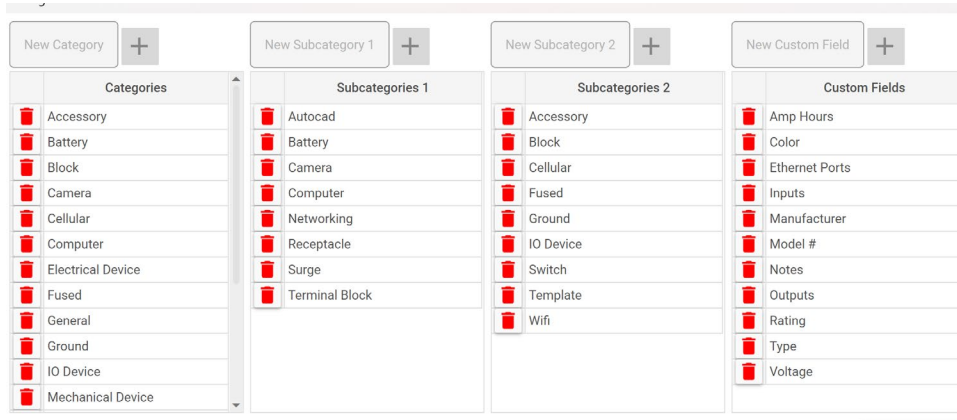
| Light Mode (Default) | Dark Mode |
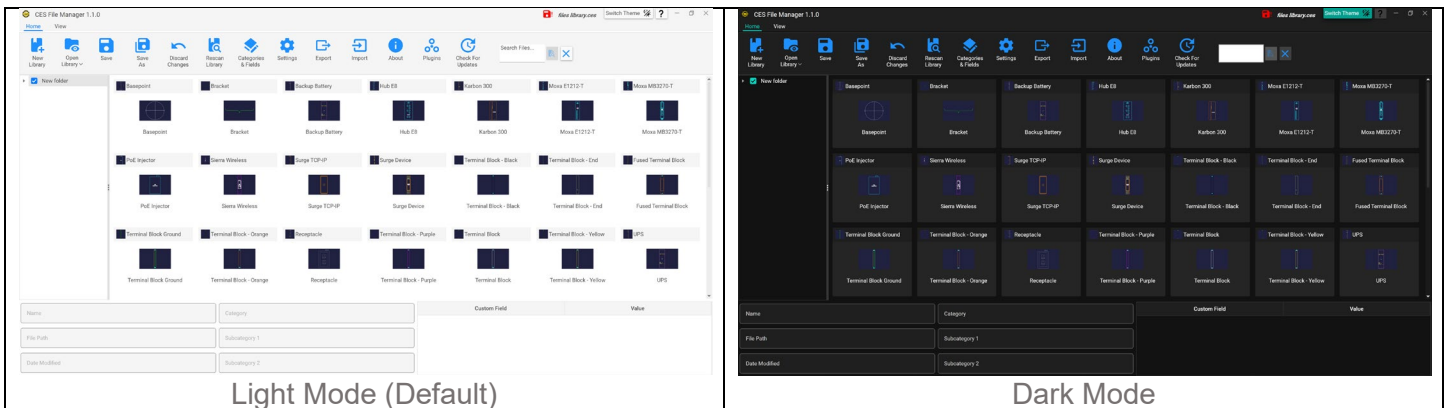
FILE EDITING: ADDING/REMOVING/CHANGING INFORMATION

ADDING/REMOVING/CHANGING CATEGORIES/FIELDS

- There are 2 methods to add/remove Categories and Fields.
- Method 1: The Categories and Fields button:

  ○ To add/remove them as an option for all files, click on the [Categories & Fields] button.
 ○ This will bring up the Categories and Fields menu.

  ○ Enter in the new category or field name you want in the new category/field area, then press the enter key or click the plus button. You can also change existing ones by clicking on the text and typing.
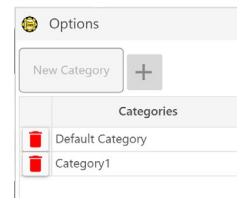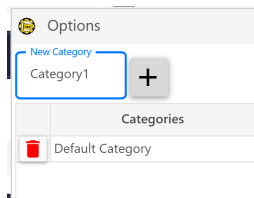
- Method 2: The File Editor screen:

  ○ Hover over a file and click the [edit] button on the top right of it.
 ○ This will bring up the file editor screen.
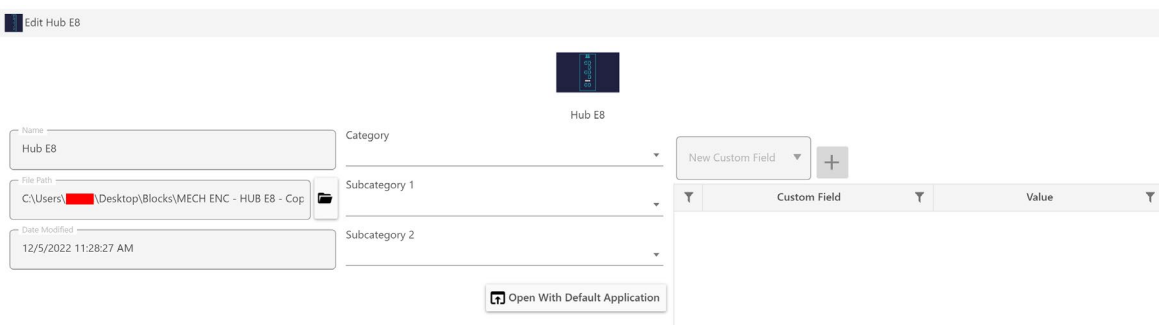
○ Next, click in the Category dropdown area or the "New Custom Field" area.
○ For Categories, type in the Category you wish to have, then press enter.
○ For Fields, type in the field you wish to have, then click the + button.

- For Fields, once you enter in the Field, you can then enter in the value for that Field.

EDITING EXISTING CATEGORY/FIELD NAMES

- To change an existing Category/Field name so that it affects all files with that category/field, click on the
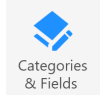

button, then click on the existing Category/Field, then start typing to change it. After you are finished typing, click the ok button at the bottom of the menu.

ADDING FIELDS AND VALUES TO FILES

- Hover over a file and click the ⬚ button on the top right of it.
- This will bring up the file editor screen.
- On the right side, you will see Fields area.
- To add a new field to that file, click the drop-down in the Add Custom Field box and select the field you want to add and clicking the + button.
   ○ Alternatively, you can add a new field by typing the name you want and clicking the + button.
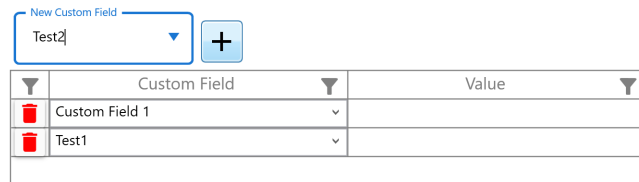
CHANGING THE FILE'S DISPLAY NAME

- CES File Manager allows you to change the display name of the file in the application itself.

- Hover over a file and click the ⬚ button on the top right of it.
- This will bring up the file editor screen.
- Click on the File Name area to edit the display name and change it to the desired name.
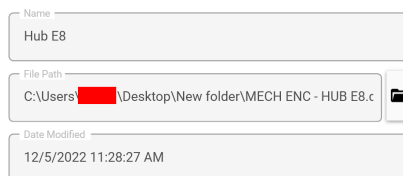
SEARCHING FOR FILES

- The prime function of CES File Manager is it's search capabilities. Click inside the search files box and type the text you wish to search for and pressing enter (or pressing the button).
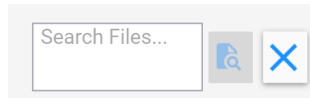
- ○ The search function will find any text that matches any of the following:
  - ▪ File Display Name
  - ▪ Categories
  - ▪ Sub-Categories
  - ▪ Field Names
  - ▪ Field Values
- ○ Results will show up in the file display window.
- ○ To clear your search, click the button next to the search bar.

SAVING/DISCARDING CHANGES

- This will display at the top right if the screen if any changes are made in the library. You may do one of the following:

    ○ Click the icon to save the changes to the current Library file.

    ○ Click the icon to save the changes to a new Library file.

    ○ Click the icon to discard any changes made to the Library file.

ADDING AND REMOVING FILES TO THE LIBRARY

- Files can be added to/removed from the library simply by adding/deleting them in the directory of the library folder in Windows.

- Once the files are added/removed, click the button to scan the library for the changes.
- This will bring up a prompt showing what files have been added/removed from the library.
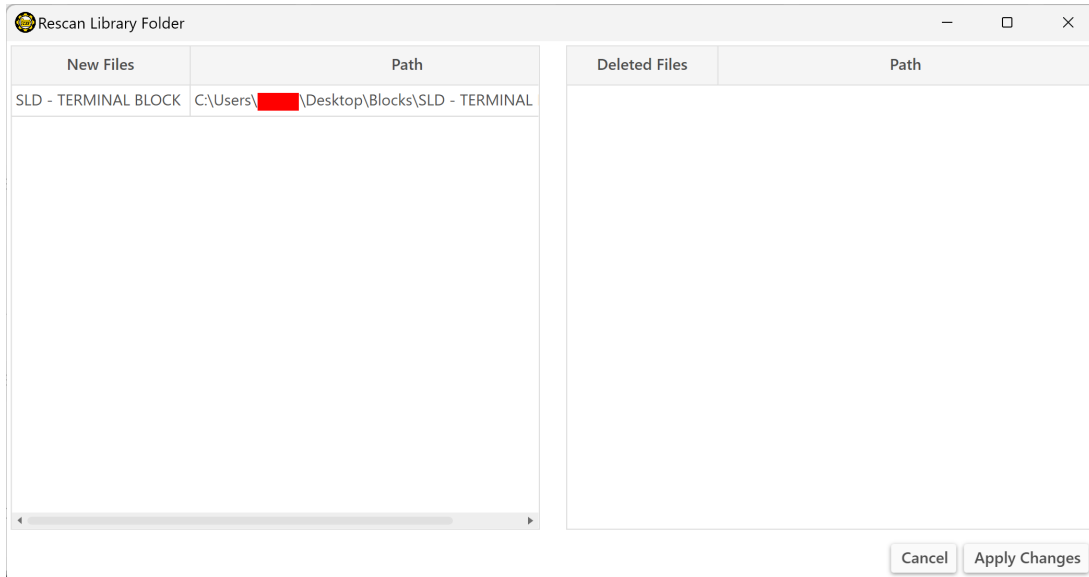

- Click apply to add/remove them.

EXPORTING/IMPORTING A LIBRARY TO EDIT IN EXCEL

New in 2025, CES File Manager allows you to export your library information to an excel file, edit each file in the library's name, category, sub-category, attributes (as well as adding attributes) and values.

EXPORTING A LIBRARY TO EDIT IN EXCEL

- To export a library, click on Export .
- This will bring up dialog box allowing you to save the exported library excel file to a location of your choosing.
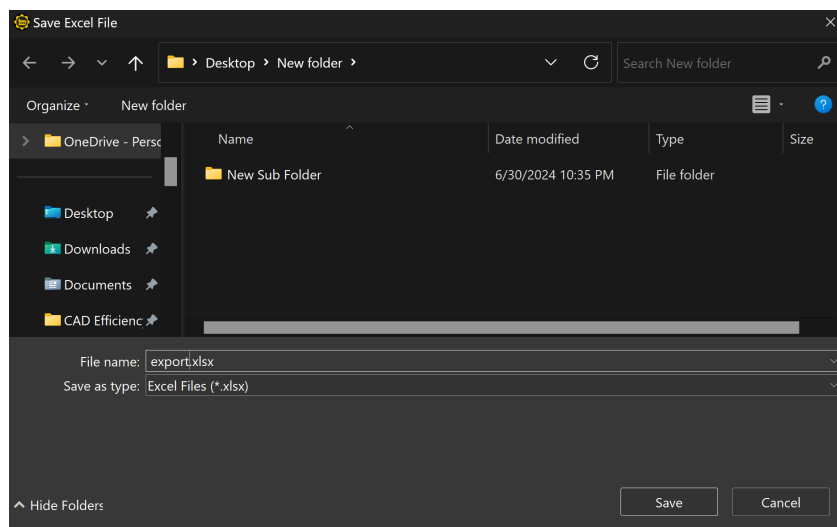
- Once saved, a windows explorer window will pop up showing where the file is located. Double click on the exported library excel file to open it up.

- .
- You can change the information in any column except for Column B, which displays the location of the file, and is what's used to associate the file with the corresponding information.
- You can also add columns after column F to add more custom fields and fill in the cell for a corresponding file to add that custom field and value to that file.
- You can also add columns after column F to add more attributes and fill in the cell for a corresponding file to add that attribute and value to that file.

IMPORTING A LIBRARY TO CES FILE MANAGER

- To import back into CES File Manager, ensure that your edits to the exported excel file are saved, and the excel file is closed.

Note: If you haven't closed the exported excel file, an error message will appear during the import process

- Next, click on ☐ .
- Once clicked, a dialog box will appear, asking you to select the exported excel file you wish to import.
- When imported, it will notify you of a successful import, as well as how many additional custom fields were added in.

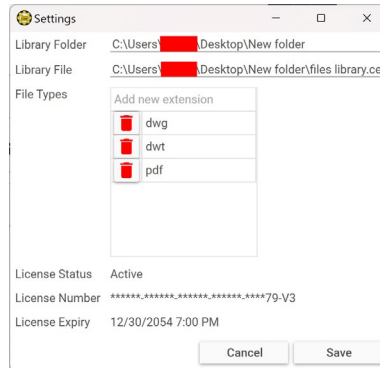# ADDING/CHANGING FILE EXTENSIONS IN THE LIBRARY

- To add/remove file extensions in the library, click on the button on the Home ribbon.
- This will bring up the Settings menu that displays Library Folder, Library File, File Types and License Information.

- To add a file extension, click on the area labeled "Add new extension" and type the file extension you wish to add, then press enter.

- To remove a file extension, click the button next to the file extension to remove it.
- Click save when finished.

UPDATING CES FILE MANAGER

- Updates are available when the button appears on the top right of the screen.
- Clicking it will download the update, close the application and install it.
- After the update install, you may relaunch CES File Manager.

- Alternatively, you may visit https://cesfilemanager.com to download the latest version.

OPTIONAL PLUGINS

- Currently, there is only 1 available optional plugin, which is for AutoCAD (2020 and above). As more plugins are added, additional material will be provided.

  NOTE: Close the application related to the plugin you are installing prior to following the next steps

- To install a plugin, click the button on the Home ribbon. This will bring up the available plugins.
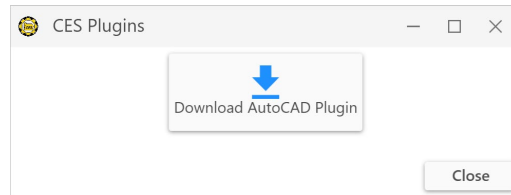
- Choose which plugins you would like to install by clicking the download button for that plugin. This will download and install it.

AUTOCAD (2020 AND ABOVE ONLY) PLUGIN

- After installing the plugin, launch AutoCAD.
    - o Note: You may need to close and reopen Autocad for the plugin to show up.
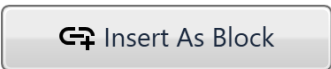- Once open, click on the Add-ins tab.
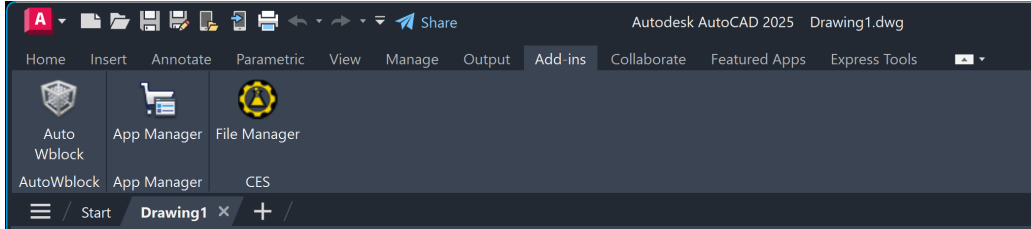
- Click on File Manager. This will open up CES File Manager from within AutoCAD.
- Everything is the same as the base CES File Manager application, except for the following:
    - o Switching to Dark Mode has been disabled (compatibility reasons).
    - o The ability to insert AutoCAD blocks from CES File Manager into AutoCAD.

    NOTE: This is intended for AutoCAD files only

    - o To insert an AutoCAD block, hover over the AutoCAD file and click on the button. This will bring up the file editor.
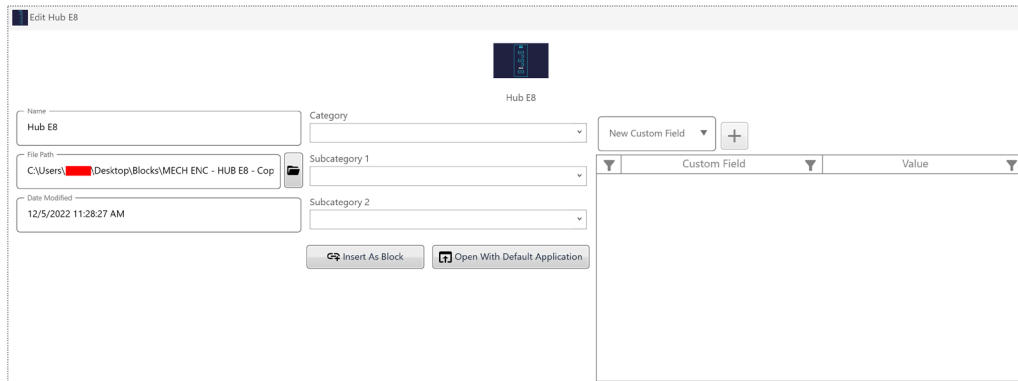
    - o Next, click on the button. This will minimize the CES File Manager screen and allow you to place the block within your file.
    - o After placing it, the CES File Manager screen will reappear.