



Adept 2019 Web Client User Guide

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1 Getting Started

1.1 Using Adept Help

To use Adept help, select the Topics command for Help. You can also click the Help button in any dialog box which provides such a button. The Help system has several important features:

- Topics - Scan the topic list for the topic you need
- Search - In the Search tab, type in a word, and Help returns a list of topics that contain that word
- See also - Most topics contain hot text that takes you to related topics. These hot text strings are highlighted
- Browse Sequences - Within a topic, click the next >> and previous << commands to see related topics in this sequence

Explore this Help file

Use the buttons at the top of the Help window's left pane to explore online help topics. Click the Forward and Back buttons to go forward and backwards to topics related to the current topic. Also at the top of each Help window's left pane are Contents and Index tabs that show other topics. Whenever you see underlined text in the Help system, you can click it to go to a related topic. After you explore the new topic, use the Back button to return to the topic you've just come from.

1.2 Adept Web Browser Clients

The Adept Web Browser Client runs inside your web browser. From the web browser window, it allows users to perform basic workflow functions. It accesses the same data stored in your Adept database and is always associated with an installation of the full Adept system. The Adept Web Browser Client is available as three products; Adept Explorer, Adept Reviewer, and Adept Creator.

The Adept programs that install and run on your computer as an application and not inside your browser are the Adept Desktop Client and the Adept Task Pane.

1.3 First Time User

Regardless of the Web Client used, the main title bar will always be shown and will reflect the Web Client application logged in; Adept Explorer, Adept Reviewer, or Adept Creator. This label in the title bar will be at the leftmost position. Selecting this name will return the application to the Home page. Just to the right of this name are three horizontal lines (hamburger) that, when selected, toggle the display of the left side pane.

On the far right side of the main application title bar are the following icons: a question mark, an "envelope", your logged in user name, and set of "gears". Selecting the "envelope" will take you to your Adept Inbox. Selecting the question mark will open these help files. Selecting your name will open a window where you can change your information source, open your Adept profile, and log out of Adept. Selecting the "gears" opens a window where you can change your user settings which control how Adept

behaves for you. If you are an Adept administrator, you also have access to admin settings which control how Adept behaves for all Web Client users.

1.4 Working with Documents

For first time users, here's an overview of how to start working with your documents.

What is a "document"

Typically you work with files; Word files, CAD files, Excel files. When these files are in an Adept controlled area, they are then called "documents". A document is a combination of a file and database information. When a file is first seen by Adept, such as when it is placed in a Work Area, Adept learns about the file, extracting information that is put into the database. The file has become an Adept document.

Your existing "legacy" documents should already be included in Libraries By the time you start using Adept, your Administrator has already imported almost all of your files into Adept Libraries. Files that were imported into Adept typically provide Adept with additional information about the file that was imported into Adept's database. Files in Adept coupled with their additional information in Adept's database create an Adept document. Adept now "knows" about each document so you'll be able to use the Search Dialog to find documents fast. Results of your search appear in the Search Results window. Or use the FileGuide or one of the many other methods to browse Adept's Vault of libraries which contain documents. Once you find the documents, you can check them out. Checking out documents creates a copy in your work area. To edit a document in your work area, open an editing application (e.g. Word or SOLIDWORKS) and open the document.

You will only be able to see libraries for which you have been granted at least View rights.

When you need to create new or copy existing documents

To create new documents, select the New Document command. You must give the new document a name and select the type of document you want to create. This will copy a document into your work area. This document is a copy of a template that has been set up by the Administrator. If a template document does not yet exist for the type of document you need to create, check with your Administrator. If you want to start from an existing document, you can make a copy of an existing document by choosing the Copy command.

Note: The document is copied into the selected work area. You can add a new work area using the Add Work Area command.

Documents you've been working on during the installation process

If you have documents that you have been working on in your own disk area, the easiest way to get them into Adept is to add a new Work Area that points to the folder where the documents are located. When you create a new work area, Adept takes a moment to "learn about" or synchronize the documents that were in the folder. If your documents have a status of NEW, you're all set to edit the documents as needed and check them into Adept when you're ready.

What to do if your documents have a status of DUPLICATE

Documents in your work area have a status of DUPLICATE when Adept has detected at least one other document with an identical name already in Adept libraries. If your site allows duplicate document names, you can check this in with the same name but Adept never allows two documents with the same name in the same library. If your site enforces unique document names, you might rename the duplicate and check it in as a new document or you could delete the duplicate when you no longer need it.

In certain circumstances, you may need to overwrite the document in your library by copying over it with a duplicate document from the work area. In this special circumstance, use the Acquire Check Out command to change the document's DUPLICATE status to OUT. Then you will be able to check it back into a library.

Acquire Check Out is valuable in certain circumstances, such as when you are using Adept for the first time and you have documents you've been working on locally that are more recent than the versions in the Adept Vault.

1.5 Source: Library or Work In Progress

When a document has a status of IN, there is only one current copy of the document. Viewing or copying that document clearly refers to this one current copy. However, when a document status is Out or Hold/Review, there is more than one copy: the one in the library and the one that is work-in-progress (WIP). In addition, as you check documents in and out of Hold/Review, Adept saves intermediate versions. When a user wants to access a document with a status of Out or Hold/Review, Adept and/or the user needs to specify which one of these copies is the one that will be displayed.

These two copies, the one that is In and the one or more that are Out or WIP, may differ. In addition, their data cards might differ and the documents they reference might differ as well. Because of the potential difference between the In version and the versions that are WIP, it is good to keep in mind all the ways these two documents might differ.

Of course the most important difference might be in the document itself. When viewing assemblies or opening them in supported CAD software, you need to know if the children are the ones that are In or the ones that are WIP. You need to know if the relationship tree in the Document Dashboard is the one that the library copy knows about or the one that the WIP knows about. The Data Card may reflect data from the library or from the WIP. The column fields in Adept's windows could reflect either the ones in the library or the ones in progress.

Note: The status of documents reflected in the Relationship Tree is an indication of the document's status which may or may not correspond to the document being resolved when opening the parent document.

It's important to know the rules that control which of these two sets of data you see. In order to know whether you are seeing the data from the version In the library or from the version Out or on Hold/Review, take a look at the status bar of the Adept window to see whether your Information Source is WIP or Library.

If the Status Bar indicates the "Information Source" is set to Library, then the documents in the Search Results or FileGuide will refer to the version of the document that is In, even when there is a WIP copy. Documents in the Document Dashboard's WIP tab will ignore Information Source and Adept will display whatever version you clicked on.

Note: In this case those documents which have a WIP copy will appear in green text.

If the Status Bar indicates the Information Source is set to WIP then the documents will refer to the version Out or Hold/Review, if available. If they are Out or on Hold/Review to another user, Adept will inform you that they are not available.

Note: The WIP Versions tab of the Document Dashboard lists versions of the document, including the IN version if one exists. When you select one of the rows in this WIP Versions tab, Adept will display the version you selected regardless of the setting for Information Source. For example if Information Source is set to WIP and you select the IN version from the WIP Versions tab, you will display or print the IN version of the document.

There are several possible areas where the documents could differ, depending on if it is the In copy or the WIP. Of course the documents themselves could differ. In addition, other pieces of data could differ:

When viewing assemblies or opening them in supported CAD software, you need to know if the children are the ones that are In or the ones that are WIP. You need to know if the relationship tree in the Document Dashboard is the one that the library copy knows about or the one that the work-in-progress knows about. The Data Card may reflect data from the library or from the WIP. The column fields in Adept's windows could reflect either the ones in the library or the ones in progress

Data Card

When viewing a data card, the default data you see depends on the Information Source. So if the Information Source is set to view the copy in the library, that copy is the one that is displayed by default in the Data Card. To toggle back and forth between Data Card values the in the library copy and the WIP copy, check/uncheck the View Library Copy check box at the top of the data card.

Column Fields and the Document Dashboard Tree

When viewing information in any Adept window, you can determine whether the information in the columns comes from the copy in the library or WIP by selecting the appropriate choice from the Information Source. Set the Information Source by clicking Information Source on the Adept status bar. Adept provides color-coded feedback to help users see at a glance whether they are looking at the document that is WIP, or is this the document that is in the library.

Note: If you have Information Source set to WIP, you can see relationships for documents with a status of Hold/Review that you may or may not have the rights to view.

Information Source and Incremental Version Number

When Adept displays work-in-progress the Adept Version number includes a minor release number. For example a work-in-progress document that has been checked out

from Hold several times might have the Adept Version number of 2.4, meaning it is Adept Major Version 2 and Minor Version 4.

Documents that are in the library always have an Adept Minor Version of 0, for example, the Adept Version of a library document might be 2.0.

View/Resolve to WIP

The user's ability to see a document on Hold is partly determined by whether or not the user has the library access right to View/Resolve to WIP. This right affects which copy of a document is accessed when its status is Hold.

Note: Documents in a workflow are on Hold/Review status. Therefore to give users in a workflow the right to see the documents in that workflow, you must grant all such reviewers the right to View/Resolve to WIP.

When a document is WIP, all users should always see the In versions of children and not the Hold/Review version. The exceptions are if the user...

- Is an Adept Administrator
- Is a Workflow Manager for the library where the child is on Hold/Review
- Is the last owner of the child on Hold/Review

The Adept administrator can extend the number of users who can see documents on Hold by granting the Library Access Right to View/Resolve to WIP. This extends access to these documents to any user who has the appropriate rights to this library.

Note: If you don't want users to see what's on Hold, don't grant this right. Make sure the users are not workflow managers or admins. Don't forget that for any document on Hold, if the user is the Last Owner the Hold/Review copy can be viewed.

Viewing/CAD Opening when parent is OUT to you and children are OUT to you

When opening CAD, children will always resolve to the WIP (on hold or out to you) if the parent and children reside in the same Adept Work Area. Adept will not resolve children across different Work Areas.

Behavior of children checked out to a Shared Work Area

Documents checked out to a shared work area (SWA) are available to all members of that

SWA. All parents and children with a status of Out in the SWA will be resolved within that SWA. If a user of a SWA checks out a child to their own private work area, then only that user will see the relationship between the parent and the child in the work area. All other users of the SWA who view or open the parent will see the child in the library, although the Document Dashboard will note the child as Out.

Viewing/CAD Opening when parent is IN or OUT to you, children are WIP

Viewing

When viewing documents, the viewer resolves to the copy specified by the current setting of Information Source.

Opening CAD

If you are the last owner of the document(s) on Hold, if you are a workflow manager for that library, or if you are an administrator, when opening CAD, children will always resolve on Hold/Review

If you are not the last owner of the document(s) on Hold, if you are not a workflow manager for that library, or you are not an administrator and you don't have the Library Access Right to View/Resolve to WIP, when opening CAD, children will always resolve to In.

Viewing/CAD Opening when parent is OUT to someone else

If a parent is Out to someone else, you can only view the parent and children that are In the library.

Viewing/CAD Opening when Parent is IN and child is OUT to you

Whenever the Parent is In, the viewer will always resolve to the children that are Out to you.

1.6 Symbols, Graphics, Icons, Glyphs

Adept uses symbols, also known as glyphs or icons, to give immediate graphic and visual feedback for a variety of information.

Symbols that are shown on the left side of a list window show if a document has parents, children or both and also shows what additional data is attached to each record.

Note: A list window is any Adept window that lists document names





There are also symbols that are displayed in the tree of the Document Dashboard that show details about relationship status.


Note: The Tree of the Document Dashboard is the list on the left side of the Document Dashboard.

Note: The paper clip symbol in the Tree indicates that the relationship was created by a user. Absence of the paperclip indicates that the relationship was extracted from a document.

Symbols in list windows that describe relationships

Glyph	Application Definition	Where is it in the Relationship?
-------	------------------------	----------------------------------

	Assembly or Drawing	Document is a Parent
	Part or Xref	Document is a Child
	Sub-Assembly	Document is both a Parent and a Child
	AutoCAD document with layouts; Internal extended information SOLIDWORKS with configurations is inside this document.	

 In the document dashboard, this is a record that is pointing to a child that is not resolved. In the work area it indicates a missing document.

Symbols in list windows that show what additional data is attached to this record



Indicates that this record includes text in the memo field of the Data Card.



Indicates that this record includes a redline (markup) comment created in the Adept Viewer.



Indicates that this record includes memo data from a Synergis Adept custom program.

Note: If the symbols that indicate parent/child relationships are not displayed correctly, an administrator should run a command to re-index parents and children which typically corrects these display issues.

Symbols in the Work Area Window:



A Work Area on a local disk



A Work Area on a network disk.



A Shared Work Area



An invalid Work Area

Symbols in the Favorites Window



A saved search. When you select a saved search in the tree on the left side of the Favorites window it is automatically rerun.



A saved search. The extended hand under the icon indicates it has been shared with you.



A saved favorite list.



A favorite list that I have shared..



A favorite list shared with me where I have Edit (pencil) and Sharing (key) rights.

Symbols in the FileGuide Window



A FileGuide folder, not selected.



A FileGuide folder, selected (open and displayed).

Symbols in the Inbox Window



An Inbox.



Displays assigned files.



Displays Out files.



Displays files needing review.

Symbols in the Library Browser Window



A Vault.



A Checked Library.



An Unchecked Library.



A Library Folder.



An Open Library.

Symbols in the Search Results Window



A Search Results.



A List Results.



A Recently Used Results.

Symbols that indicate types of libraries in the User-Group-Library Administration dialog



This is a Checked Library.



This is an Unchecked Library.



This is an Open Library.



Direct Vault



FTP Vault



AFS Vault (can be set to replicate)



The dot in the upper left indicates this library is enabled for Full Text Search



The square around the outside of the glyph indicates that this library is filtered, and documents in this library will be excluded from some operations.

Symbols displayed in the Tree (left side of Document Dashboard) show details about relationship

Icon

Definition



The current document is not selected, but is part of a relationship



The current document is selected and has no relationships



The current document is selected and is an Assembly/Parent



The current document is selected (blue) and is a Part/Child (arrow in upper left corner)



The current document is selected (blue) and has both a Parent and a Child (arrows in upper left corner and bottom.)



The document is editable by the user



The document is part of a circular reference



The document is an underlay.



The document is an overlay.



The document is fixed at the current version



The document floats to the most current version.



The document is docked.



The document is in. (The brighter color indicates it is selected.)



The document is new.



The document is out



The document is on hold



The document is fixed at a previous specified version.



The document is in and the paper clip indicates the document relationship was created by the user, not by a CAD application.



The paper clip indicates the document relationship was created by the user, not by a CAD application. The "N" indicates it is new



The paper clip indicates the document relationship was created by the user, not by a CAD application. The "O" indicates it is out



The paper clip indicates the document relationship was created by the user, not by a CAD application. The padlock indicates it is fixed at a specified previous version.



The paper clip indicates the document relationship was created by the user, not by a CAD application. The "H" indicates it is on hold.



The A indicates the document is archived.



A red circle with a cross through it indicates that this relationship is broken, that is, Adept is unable to resolve the link between documents. The red circle and line are superimposed over any other icon that would apply to this document.



The red T on the left of the glyph indicates an attachment to a Transmittal



The red T on the left coupled with a red line in the lower right indicates an attachment to a Transmittal that includes children.

1.7 Color-coded Fonts

To help you interpret your Adept windows, in some cases the color and choice of font text conveys additional information.

Shading of search criteria

When you search for documents, the results are displayed in the Search Results window with each searched criteria highlighted.

Note: This highlighted text may temporarily change the underlying color coding.

Color for Work In Progress and its Complement

The default color for displaying the latest Work In Progress is Red.

Work in Progress or IN Indicated by Display Color in FileGuide, Search Results, and Work Area

When there is no Work In Progress copy of a document, that is, when the latest version is IN the Library, the color of the IN copy is black. The latest Work In Progress version is red. When there is a copy of this document with a status of OUT or on HOLD, the IN copy is displayed in the color calculated to complement the Work in Progress color.

Listing Work In Progress Versions in the Document Dashboard

If you have several Work In Progress copies of your document, these are called "dot versions." You can see the list of all Work In Progress "dot versions" by looking in the WIP Tab of the Document Dashboard. The most recent one is displayed in the WIP color. All the previous dot-versions are displayed in a complementary color, calculated by Adept.

When you have Information Source set as WIP, you typically will see the document out to you. But if a document is OUT to someone else, even if you have Information Source set as WIP, you will see the IN version. Or if the status is Hold/Review/AssignReview and you don't have the right to see documents with a status of Hold you will see the IN copy. In that case, it will appear blue (or the current non-WIP color.)

Status field colors

The Status field is also color-coded. Here are the rules that govern colors of the Status:

<u>Status</u>	<u>Color</u>
New	Blue
In	Black
Out	Magenta

Duplicate	Green
Hold	Red
Assign	Orange
	Light
Assign/Hold	Blue
Review, AssignReview	Light
	Blue
Archive	Pale Blue

Gray Color Indicates Document Linkage Failed Verify Test

Any linked record that Adept has determined no longer has an associated document will be displayed in a light gray color.

Green Color for Records

When the shade of a particular record is green it means you are looking at the library copy of a record which has a work-in-progress copy.

1.8 User settings

User options apply to each user's own login and can be set by each Adept user.

Document Dashboard Display and Virtual Library Population**Stop at AutoCAD Overlays**

When you enable the option "Stop at AutoCAD Overlays," Adept displays the Parent/Child hierarchy only to the depth of the Overlay and no further. In documents that reference Overlays, this option reduces the number of children copied to the Virtual Library as well as reduces the amount of time required for a Search for Children command to complete. See Search for Children for more details.

Stop at SOLIDWORKS In Context References

When you enable the option "Stop at SOLIDWORKS In-context References," Adept displays the Parent/Child hierarchy only to the depth of the In-context Reference and no further. In documents that reference In Context References, this option reduces the number of children copied to the Virtual Library as well as reduces the amount of time required for a Search for Children command to complete. See Search for Children for more details.

Stop at Inventor Substitute References

When you enable the option "Stop at Inventor Substitute References," Adept displays the Parent/Child hierarchy only to the depth of the Substitute Reference and no further. In documents that reference Substitute References, this option reduces the number of children copied to the Virtual Library as well as reduces the amount of time required for a Search for Children command to complete. See Search for Children for more details.

Stop at MicroStation No Nesting References

When you enable the option "Stop at MicroStation No Nesting References," Adept displays the Parent/Child hierarchy only to the depth of the No Nesting reference and no further. In documents where No Nesting references are used, this option reduces the

number of children copied to the Virtual Library as well as reduces the amount of time required for a Search for Children command to complete. See Search for Children for more details.

Local Virtual Library Path

Adept uses the Virtual Library to store temporary files, reference documents for Adept parents documents (e.g. assemblies and drawings). The documents copied for this purpose are copied to Adept's Virtual Library which is located within this folder. The current location of the Support Folder is shown in this field. You can also change it by clicking on the associated browse button.

Note: Because the Virtual Library will consist of multiple nested folders, it is recommended that you create this folder as close to the root as possible in order to reduce the length of nested paths

Adept Client Services Downloads

For managing local document storage, Adept Creator uses two Adept components, the Adept Client Services and RealDWG. Both should be installed for Adept Creator users. If your installed version of either of these components is out-of-date when compared to what is available on your Adept distribution server, you will be prompted to download the latest version automatically.

1.9 Admin settings

User options apply to each user's own login and can be set by each Adept user.

Upload Settings

This defines the folder where users uploading files to Adept will be placed. Additionally, an email address can be specified where, once an upload is complete, an email will be sent to the input email address. The email subject line can also be defined in this dialog and the email feature enabled.

Editable Fields

This setting applied to all Adept Web Clients and is a way to identify those Data Fields that are allowed editing in the Adept Web Client. Fields on the right side as defined as editable while fields on the left side are not. Only Adept custom fields are listed as system fields are never editable.

View Options

This dialog allows the admin to specify if users of the Adept Web Client only have access to the Adept Viewer or can view documents in Adept by using alternate viewers. When using alternate viewers, the Adept Viewer will not be used unless the entered file extension is not related to a specific Windows application within the operating system.

System Options

In this dialog, the Adept admin can determine if the Download command is made available to Adept Web Client users and whether the Adept Virtual Library is cleared upon login by Adept Web Client users. A button also exists to clear the Virtual Library immediately.

1.10 Selecting

In the results area, you select one or more documents. Selecting a document will highlight the row, typically darkening it. Selecting a selected row will unselect the row. Doubleclicking a row will have no effect as the row will be selected, then unselected. Once a document is selected, command appropriate for the selected document become available on the ribbon.

1.11 Refresh Current Window

Your Adept window reflects the state of documents on the network. This document information is accurate at the time Adept first displays it on your screen. As the information sits on your screen, other users may cause the information to change. For example, if you are looking at your Inbox, and someone assigns a document to you, the newly assigned document is not instantly visible to you.

This new information will be correctly displayed the next time you repaint the screen. You can force the window to be repainted to show all up to the minute information by running the Refresh Window option using the F5 keystroke or you can close and open the window.

Note: In the Search Results window, the F5 key reruns the search.

2 Adept Web Client Ribbon

Adept Web Client's commands can be executed by clicking on the buttons in the ribbon. When you hold your mouse over each button, a tooltip appears which shows you the function of that button. All buttons are always shown but may not be enabled for selection. Buttons are often disabled for various reasons, but usually are disabled because the command is inappropriate given the current situation. If a command is not enabled, review the situation to ensure that the command should be enabled.

To hide or collapse the ribbon, select the up arrow located at the far right side of the ribbon. Selecting the up arrow will collapse the ribbon but leave the ribbon tabs visible. Selecting a tab in this mode will display the ribbon until the button is selected.

The Adept Web Client ribbon bar is currently not customizable. Each tab contains commands that are not available in any other location in the interface.

The Adept Web Client ribbon is comprised of four standard tabs: Home, Search, Document, and Workflow.

2.1 Ribbon Tab: Home

Adept Web Client Ribbon Tab for Home contains commands as described below:

Search Card

Selecting this button opens the Search Card window.

Data Card

Selecting this button open the Data Card window and displays the metadata for the selected document. In this window you can view the existing metadata for the document and edit the metadata should you have the appropriate rights to the document.

View

Selecting this button opens the viewer to display the selected document.

Check In

Selecting this button opens the Check In dialog. In this dialog, you can select the destination Library (if the document has not been checked in before), select an Adept user to have this document assigned to them, specify for the document to be immediately checked out again, and whether to force creation of an Adept version.

Check Out

Selecting this button open the Check Out dialog. In this dialog, you can specify the Work Area where the document will be placed upon successful Check Out. If you have already been in a Work Area, that Work Area will be the default shown in the drop down. If not, you will have to select a Work Area before the OK button will be enabled.

Reject

Selecting this button opens the Reject document dialog. Rejecting a document moves it to an earlier step in the current workflow.

Approve

Selecting this button opens the Approve document dialog. Approving a document moves it to a later step in the current workflow, or approves the document to an In status.

Assign

Selecting this button opens the Assign dialog. Assigning a document makes the assigned user the current owner of the document.

Unassign

Selecting this button opens the Unassign dialog. Unassigning a document removes ownership of the document.

Copy URL

Selecting this button copies the URL to the windows clipboard for the selected document. Once copied to the clipboard, you can paste this information into an email or document to be used for accessing the document at a later time.

Send To

Selecting this button opens the dialog for initiating the sending of a selected document(s) and/or document information to a specified individual or location. See the topic Send To for more information.

Relationships

Selecting this button opens the dialog for creating and managing manual relationships for the selected document.

2.2 Ribbon Tab: Document

Adept Web Client Ribbon Tab for Document contains commands as described below:

New

Selecting this button opens the dialog for creation of new documents. See the topic Create New Documents for more information.

Open for Edit

Selecting this button will initialize the target application for the selected document and once the application is started, open the selected document into the application. The target application is determined by the associativity for the selected document's extension as defined in Windows.

Check In

Selecting this button opens the Check In dialog. In this dialog, you can select the destination Library (if the document has not been checked in before), select an Adept user to have this document assigned to them, specify for the document to be immediately checked out again, and whether to force creation of an Adept version.

Check Out

Selecting this button open the Check Out dialog. In this dialog, you can specify the Work Area where the document will be placed upon successful Check Out. If you have already been in a Work Area, that Work Area will be the default shown in the drop down. If not, you will have to select a Work Area before the OK button will be enabled.

Copy

Selecting this button opens the Copy dialog. In this dialog, you can specify the Work Area where the document will be placed upon successful copy. If you have already been in a Work Area, that Work Area will be the default shown in the drop down. If not, you will have to select a Work Area before the OK button will be enabled.

Rename

Selecting this button opens the dialog to rename the selected document.

Delete

Selecting this button opens the dialog to delete the selected document.

Acquire Check Out

Selecting this button opens the dialog which allows a document with a status of Duplicate to be converted into the checked out document with a status of Out. See the topic Acquire Check Out for more information.

Release Check Out

Selecting this button opens the dialog which allows for a document with a status of Out to be released and converted into a document with a status of Duplicate. See the topic Release Check Out for more information.

Undo Check Out of Unchanged Children

Selecting this button opens the dialog for releasing Check Out for checked out children documents that have not changed from last checked in versions. See the topic Undo Check Out of Unchanged Children for more information.

Upload

Selecting this button opens the Upload Document dialog. In this dialog you browse to one or more files that are not controlled by Adept (not in an Adept Work Area) and have the option to upload them to the Adept Web Server. The upload location is defined by the Adept administrator.

Download

Selecting this button opens the Download Document dialog. In this dialog you choose options to have the downloaded files packaged in a ZIP file and whether to include related children files in the download. Selecting OK opens a following dialog stating if your files are ready for download. This dialog also shows the resulting filename(s) used by the download. Click each filename listed to complete the download.

Refresh Extracted Data

Selecting this button forces an extraction of all data from the selected document, storing the extracted data in Adept. See the topic Refresh Extracted Info for more information.

Clear Extracted Data

Selecting this button forces a clearing of all extracted data stored in Adept for the selected document. See the topic Clear Extracted Info for more information.

2.3 Ribbon Tab: Search

Adept Web Client Ribbon Tab for Search contains commands as described below:

Search Card

Selecting this button opens the Search Card window.

Last Search

Selecting this button performs the last search executed, refreshing the current search results window.

Search for Children

Selecting this button opens the Search for Children dialog.

2.4 Ribbon Tab: Workflow

Adept Task Pane's Ribbon Tab for Workflow contains commands as described below:

Reject

Selecting this button opens the dialog for rejecting document(s) to the previous step in the document's workflow. See the topic Reject for more information.

Expedite Approve

Selecting this button opens the dialog for approving document(s) to a selected forward step in the workflow. See the topic Expedite Approve for more information.

Final Approve

Selecting this button opens the dialog for approving document(s) so that the document(s) skips all forward workflow steps (if any), completes its WIP state, and is given an Adept status of In. See the topic Final Approve for more information.

Expedite Reject

Selecting this button opens the dialog for rejecting document(s) to a selected backward step in the document's workflow. See the topic Expedite Reject for more information.

Approve

Selecting this button opens the dialog for approving document(s) to the next step in the document's workflow. See the topic Approve for more information.

Reject To

Selecting this button opens the dialog for rejecting document(s) to a selected backward step in the document's workflow. See the topic Reject To for more information.

Reset to Start of Workflow

Selecting this button opens the dialog for rejecting document(s) to the first step of the document's workflow. See the topic Reset to Start of Workflow for more information.

Reroute Active Workflow

Selecting this button opens the dialog for rerouting document(s) from its current workflow to the selected workflow. See the topic Reroute Workflow for more information.

Set Document Workflow

Selecting this button opens the dialog for permanently setting a document's workflow to be different from the document's Library workflow. See the topic Set Document Workflow for more information.

Assign

Selecting this button opens the dialog for assigning document(s) to another user. See the topic Assign Documents for more information.

Unassign

Selecting this button cancels this document(s) assignment. See the topic Unassign Documents for more information.

3 Adept Web Client User Interface

3.1 Introduction

Adept functionality is accessible from within your web browser through the Adept Web Client interfaces. From these interfaces, you can perform all the needed tasks to identify the document or documents to be opened, checked in, checked out, approved, or rejected. These interfaces provide the following capabilities:

About this Help File

This help file contains information that applies to all of the Adept Web Clients. Depending on which web client application you are logged into will determine which functionality you will have available. Which web client application you log into is dependent on how your Adept administrator has configured your user profile.

Adept Explorer

Adept Explorer is a thin, web client designed for people who want browser-based access to documents and information stored in Adept. Its streamlined interface gives you fast web-based searching, viewing, printing, redlining, assigning and copying of multiple CAD formats, MS Word, MS Excel, PDF, TIFF formats and hundreds more.

Adept Reviewer

Built on the Adept Explorer platform, Adept Reviewer adds full workflow participation to your Adept web client experience. Adept Reviewer lets you approve, reject, reject to a previous step, reject to an originator, re-route to a new workflow, expedite approvals and rejections, and add comments.

Adept Creator

Adept Creator is the top tier web client in the Adept product suite. It includes all the functionality of Adept Explorer and Reviewer, and adds check in and check out functionality for users who need to create and modify documents. It's the best solution for all non-CAD users across any department who need to create or edit documents of any type and for CAD users working with self-contained drawing files that don't rely on external file relationships.

All three Adept Web Clients share similar user interface components. To review the introduction to the Web Client user interface, please review the help topic. To review the Web Client ribbon, please review the help topic.

3.2 Home

The Home selection provides a display for typically references commands. The Home page provides three sections: Action, Favorites, and Saved Searches.

Above Actions is a drop down where you can select a specific Data Card to use for searching Adept. Entering text in this cell will search all fields of the selected Data Card using the entered search criteria.

The left side of the window provides access to various areas in Adept. Selecting one of these from the left side pane will place you into that area and allow you to perform other

actions specific to the selected area. At any time, you can select the left arrow shown in the pane's title bar to return to Home.

Just above the left side pane is a text box with two icons; a "funnel" and a "magnifying glass". Selecting the funnel allows you to select the specific Data Field that you want to use when performing a search by typing in search criteria in this text box. Selecting the magnifying glass will execute the search using the typed criteria and the field specified. Using this text box, you can also perform a Full Text Search, which not only searches Adept Data Fields but searches the text extracted from Adept documents as well.

The right side is the results area. For details on this area, see the results area topic.

Across the top, just under the Adept Web Client title bar is the ribbon. The ribbon provides access to the majority of commands available. Commands are executed by selecting the appropriate button. Should a button not be appropriate or not be available to you, the button will be grayed out. Hovering over a button provides a tool tip with information about the button. For details on the ribbon, see the ribbon topic.

3.3 Favorites

The Favorites selection provides a display of Favorites, both named and shared. In this pane, selecting any leaf will display the related documents in the results area. To create a new Favorite list, following these steps:

1. Select the "+" icon just above the list of Favorites
2. Enter the name for this Favorite list to be saved

There are two icons on each row of a Favorite. Hovering over the "i" icon displays a tooltip showing information about the Favorite, who created it and when it was created. Selecting the other icon provides a context menu with commands to add or remove items from the Favorite list, or rename or delete the Favorite list. Selecting Add Items or Remove Items uses the currently selected documents from the results area as input for modifying the Favorite list.

Favorites can only be shared from within the Adept Desktop Client but shared Favorites are visible in the Adept Web Client applications.

Selecting the three horizontal lines (hamburger) on the right side of the Favorites title bar provides a quick way to navigate to other panes.

Note: With WebAPI-based clients, users are able to add documents with a status of "New" to a favorite list. Those documents with a status of "New" will not display in the results window because of the "New" status of the document. Once those documents have been checked in once, the user will then see those files in the results window of the favorite list.

3.4 Saved Searches

The Saved Searches selection provides a display of Saved Searches, both named and shared. In this pane, selecting any leaf will display the related documents in the results area. To create a new saved search, following these steps:

1. Perform the search to be saved using any search method desired.
2. Select the Saved Searches tab
3. Select the "+" icon just above the list of Saved Searches
4. Enter the name for this search to be saved

There are two icons on each row of a Saved Search. Hovering over the "i" icon displays a tooltip showing information about the Saved Search, who created it and when it was created. Selecting the other icon provides a context menu with commands to rename or delete the Saved Search. When selecting the Delete command, the Saved Search is deleted immediately and without confirmation.

Saved Searches can only be shared from within the Adept Desktop Client but shared Saved Searches are visible in the Adept Web Client applications.

Selecting the three horizontal lines (hamburger) on the right side of the Saves Searches title bar provides a quick way to navigate to other panes.

3.5 Inbox

The Inbox selection provides a display of your Inbox. In this pane, selecting any leaf inside your Inbox will display the related documents, such as documents that are assigned to you, checked out by you, or awaiting your review.

You can also view other users' Inbox's in the Adept Web Client by using the Inbox Membership command available in the Adept Desktop Client and adding other user's Inbox's to your Inbox membership.

Selecting the three horizontal lines (hamburger) on the right side of the Inbox title bar provides a quick way to navigate to other panes.

3.6 Library Browser

The Library Browser selection provides a tree display of Libraries and their sub-Library leaves as configured in your Adept Vaults. In this pane, selecting any "+" symbol will expand the tree leaf while selecting any "-" symbol collapses that leaf. Selecting a tree leaf displays documents in the results area that reside in the corresponding Adept Library.

Just below the Library Browser title bar there is an entry box to filter the tree display. Typing in one or more characters will filter the tree display to only Libraries that contain the entered characters. For example, entering "Adept" in this field will result in only Libraries containing the work "Adept" being displayed. Filtering is not applied to Vault names.

Just under the filter entry box to the right side is a gear icon. Selecting this icon provides access to two options: Name and Folder. Selecting one of the other will change the way Libraries are displayed in the tree to use either the Library Name or the Library Folder, which may be different.

Selecting the three horizontal lines (hamburger) on the right side of the Library Browser title bar provides a quick way to navigate to other panes.

3.7 FileGuide

The FileGuide selection provides a display of configured FileGuide Views. In this pane, selecting any leaf will display the related FileGuide View tree in the left pane. Selecting a tree entry then displays documents in the results area. Selecting the "+" symbol expands the tree to show lower level leaves which, when selected, display the appropriate documents in the results area.

FileGuide Views are created by the Adept administrator and are available to all users of Adept.

Selecting the three horizontal lines (hamburger) on the right side of the FileGuide title bar provides a quick way to navigate to other panes.

3.8 Work Area

The Work Area selection provides a display of defined Work Areas. In this pane, selecting any leaf will display the related documents in the results area. Typically documents displayed will have an Adept status of New, Out, or Duplicate. To create a new Work Area, following these steps:

1. Select the "+" icon just above the list of Work Areas
2. Select the Browse button and browse to the folder desired to make an Adept Work Area
3. Once the correct folder is selected, select the Open button in the dialog
4. Optionally, provide a label for the Work Area that might be used to better identify the Work Area by its contents
5. Select the OK button to add the new Work Area

There are two icons on each row of a Work Area leaf. Hovering over the "i" icon displays a tooltip showing information about the Work Area, the folder path. Selecting the other icon provides a context menu with commands to edit, delete, or show the Work Area in File Explorer. When selecting the Delete command, the Work Area is deleted immediately and without confirmation. If there are documents in the Work Area with an Adept status of Out, you will be prevented from deleting the Work Area until those documents are checked in or deleted.

Selecting the three horizontal lines (hamburger) on the right side of the Work Area title bar provides a quick way to navigate to other panes.

3.9 Results Area

The Results Area will always show the results from the selection in the left side pane. As you browse or search using the panes, results will be shown in the Results Area.

Use the Results Area to review the documents you have searched or browsed for. The title bar of the results area will provide information regarding how the results showing were calculated. For example, if the results are from a search, the search criteria will be shown in the title bar.

Column information in the Results Area

The default columns are filename, status, library, and owner. The user may select the three lines icon on the far right side of the results area title bar (hamburger) to access

the grid settings used for the results area. In this dialog, the user may add or remove columns from the results area display by dragging and dropping the columns from one side of the dialog to the other. Columns listed on the left side include all customer Adept data fields as well as system fields. Fields are listed alphabetically with custom fields in black and system fields having a blue hue. Columns cannot be repeated and can be added only once. Added columns will be retained until removed by the user.

A second tab provides access to defined Column Sets that are available for the user. Column Sets can only be created and shared from within the Adept Desktop Client but shared Column Sets are visible in the Adept Web Client applications.

Columns can be reordered by dragging and dropping within the right column of the dialog.

Next to the Grid Setting icon is a drop down used to specify the number of results to be displayed in the results area for a single page. Should the results of any search or selection exceed this number, then to view those results the user must move to the next page. In general, the larger the page size, the longer Adept will take to calculate and display results. Available page size selections are fixed and cannot be changed. Page is accomplished by using the paging selections in the status bar at the bottom of the results area. There are icon selections to move to the next/previous page, the first/last page, or you can type in the specific page wanted.

Also on the status bar, on the left side, is an Export button. Selecting this button opens a context menu with selections that control how the results area is to be exported. Selections include export to CSV or to Excel formats, and exporting only the visible results (the current page) or all results (all pages). Selections are allow to include or not include one or more of the columns currently being displayed in the results area.

3.10 Supported CAD and Office Applications

Adept manages any document that can be accessed by Windows. For documents that obey Windows conventions, the properties can often be read into Adept. At this level of integration, many documents can also be viewed by Adept's built-in Viewer with no additional software.

For some applications and document types, Adept Web Clients offer an integration by extracting information from the documents. Refer to Extract Data for a description of files and applications that Adept support with this level of integration.

MS Word, MS Excel, PDF, AutoCAD, SOLIDWORKS, MicroStation

For these applications, Adept extracts information from the document including specialized knowledge of document properties, thumbnails, and relationships. Refer to Extract Data for a description of files and applications that Adept supports with this level of integration.

- Automatically extracts properties, attributes, or tags into custom database fields called Extraction Fields

- For CAD and Excel, automatically extract relationships for external referenced objects (OLE linked)
- Extract thumbnail images (when document is saved with saving thumbnails enabled)

4 Document Dashboard

4.1 Document Dashboard Introduction

The Document Dashboard displays additional information about your documents. Its main function is to show the relationships among documents. In the left pane, it shows the relationship tree. When you select a document in the tree, the right pane shows a variety of information, such as the children of the document you selected or the "where-used" documents where your selected document is being used. Other tabs in the right pane show Workflow, Audit Trail, Versions, Extended Data, and more. (Extended data changes depending on the document type.)

When you select any document in the results area, information about that document is loaded into the Document Dashboard. If you have the option for Auto Update checked, the information is displayed automatically when you select the document. If this option is not checked, you must manually refresh the Document Dashboard by manually selecting the Update option provided for the Document Dashboard.

To close the Document Dashboard, select the "X" icon on the right side of the Document Dashboard title bar.

4.2 Document Dashboard Relationship Tree

The left pane displays the relationship tree. These relationships are either extracted from supported CAD and office documents or manually created relationships. Adept automatically extracts relationships among documents in Excel documents, AutoCAD DWG and DST document formats, and in SOLIDWORKS, MicroStation, KeyCreator and Autodesk Inventor documents. It also displays manual relationships among documents.

Note: Manual relationships are create by an Adept user and are not extracted from the document.

The Tree View shows you the names of the documents related to your selected document. Relationships can be nested and the tree shows you the relationships by indenting each generation of children. If your document relationships are too complex, you can simplify and speed up the display by choosing to see only the first level deep of nested documents. To choose this option, right-click in the tree of the Document Dashboard to display a list of options.

4.3 Document Dashboard Tabs

The right side of the Document Dashboard shows a detailed display of information related to the documents in the relationship tree. You can change which fields of information are displayed by adding or changing columns.

By selecting the tab at the top of the Document Dashboard you specify the information to view: Where Used, Children, Versions, WIP Versions, Workflow, Audit Trail, Config/Sheet, Drawing Info, and Thumbnail.

To use the various tab views in the Document Dashboard, select a document in the relationship tree of the Document Dashboard window. For the selected document you

may now select one of the tabs on the right side of the Document Dashboard to view information.

While you are viewing any of these tabs, you can get information about a different document when you select a different document in the tree.

Where Used

The list shows all the immediate parents of the document you selected in the tree.

Children

The list shows all the children of the document you selected in the tree. The Child Version column displays the version level of the children documents.

Versions

The list shows the version history of the document that is currently selected in the tree.

WIP (Work In Progress) Versions

When you check documents in and out of Hold, Adept stores intermediate versions, called minor versions. The list shows these intermediate versions.

Workflow

This list shows detailed information at each step including the date and time the document arrived at each step, the date and time the document departed each step, the name of the user who issued the command that finished each step, and the name of the command that was used. For steps that require multiple approvals, additional rows are added for each approval that is already received or that is pending. To see this information, a user must have the View/Resolve to WIP right for the library.

Audit Trail

The list shows the commands that have affected this document. Commands such as Check In, Check Out, and View are tallied.

Config/Sheet (SOLIDWORKS Configurations, Inventor iParts/iAssemblies, and AutoCAD Layouts)

The list shows SOLIDWORKS, Inventor, or AutoCAD information, depending on which document type is being displayed.

Drawing Info

The list shows specific information extracted from the document regarding its children.

Thumbnail

The Thumbnail tab shows you a thumbnail image of documents. For some documents, the Save Preview option must have been enabled for the document when saving or a thumbnail will not be available.

Symbols

Adept displays symbols to show at a glance, some relevant properties of the documents listed in the Document Dashboard.

· Sideways Push Pin

Indicates the version of the document Floats to current.

- An anchor

Indicates the document is Docked. That means it is fixed to the Current when it was checked in, and when it is checked out it floats.

- Paper clip

Indicates that this relationship was established manually using the Create Relationship function, rather than by extracting the relationship information from a supported CAD document.

- Green versus gray

Indicates type of relationship: A Gray leaf with no paperclip indicates an extracted relationship that is automatically created from a CAD document while a Green leaf with a paper clip indicates a relationship that was manually created.

4.4 Document Relationships

Documents are often related to each other. Adept supports two types of relationships among documents. The first type of relationship, called an "extracted" relationship, helps Adept manage AutoCAD, Inventor, and SOLIDWORKS documents. In this type of relationship, Adept automatically finds all of the documents that the CAD application has associated with each document, first by extracting the relationship information from the document itself, and on an ongoing basis, by managing the location of all the documents related in the parent document.

The second type of relationship is a "manual" relationship which is created when the user uses the create relationship command in Adept. Manual relationships can be among documents of any type, such as CAD documents, Microsoft Office, raster images, and so on.

Adept uses generalized terminology to describe the relationship among these documents. Adept's name for a document containing a reference is the "Parent" and the document that is referred to by the reference is called the "Child." In Mechanical CAD, such as Inventor or SOLIDWORKS, the parent is typically an assembly and the child is typically a part. In AutoCAD, the parent is simply the document and the child is called an Xref or external reference.

Adept tracks and controls these documents and their relationship to each other. Information about the relationships, including Where Used, is displayed in the Document Dashboard. The Document Dashboard also provides controls to manipulate the specific version of a child or to replace a child with a different document.

Adept gives immediate feedback if a document has parents and/or children by displaying an icon to the left of the document name in the results windows. The square to the left of the name indicates the document is a parent. The "hook" indicates that a document is a child. And a combined square with a hook indicates the document is both a parent and a child.

Note that in a document that is checked out, the relationships in the work-in-progress document may be different from the relationships in the version that is in the library. You can select which of these sets of relationships you want displayed by choosing the desired Information Source.

"Stop at..." Options

Two Xref types supported by AutoCAD are Overlay and Attachment. Adept correctly tracks both of these types of Xrefs when displaying the document in the viewer or when opening the document in AutoCAD. However, depending on an option you can choose in the Options dialog, you may control the way Adept lists the parent/child relationships. By default Adept will list as many generations of parent/child relationships as you choose. These Xrefs will be listed hierarchically in the relationship tree of the Document Dashboard, regardless of whether the Xrefs are Overlays or Attachments.

When you enable the option in the Options dialog to "Stop at AutoCAD Overlay," Adept displays the parent/child hierarchy only until it reaches the Overlay. In documents that reference Overlays, this option affects Adept's listing of Xrefs in these areas::

Document Dashboard

Send To, with "Include Children" option

Search for Children

Children selected for Check In

Children selected with the extension "Children Check Out"

In these areas, Adept's listing of Xrefs will exactly reflect the same hierarchical depth that is represented for them in AutoCAD.

There are similar options for SOLIDWORKS, Inventor, and MicroStation that affect the level of children display. These settings also affect the same areas as affected by the AutoCAD option noted above.

4.5 Create/Edit Manual Relationships

Using the Relationships button located in the Home tab ribbon, users can join together documents of any type into parent/child relationships. After creating the relationships, they can be viewed in the Document Dashboard including viewing the versions of children and where-used information.

Note: This dialog affects ONLY relationships created manually. It does NOT affect relationships that were created by extracting supported CAD software such as AutoCAD, Inventor, and SOLIDWORKS.

Select the Parent BEFORE you select the Relationships button

To create a new relationship, first select the document you want to be the parent in the relationship and have that document shown in the relationship tree in the Document Dashboard. Then select the Relationships button. This freezes the relationship tree and enters a mode where relationships can be created and edited. A flyout dialog is presented from the right side of the browser window.

Adding children

Once in this mode, you can perform searches and change windows so as to be able to select the desired document(s) to be made children of the parent document now showing in the dialog. Select the child documents and they are automatically added to the list. Only one document can be added at a time.

Removing children

You may remove any children from the relationship by selecting them in the dialog and clicking the "Remove" button at the bottom of the dialog.

5 Search

5.1 Adept Search Matrix

When searching in Adept there are several ways of finding documents. One can use the Search All Fields (SAF) feature, the Data Card (DC) search criteria, Quick Search (QS) from the top of the Search Results, or Full Text Search (FTS). These are all different types of searches programmatically and the results are stored differently by Adept. Therefore, what is possible after performing the initial search has restrictions and conditions specifically around appending and refining.

Note: The Adept Client types (Desktop, Web Browser, Task Pane) may vary in their searching capabilities and results.

The following table shows which subsequent searches are possible and which are not possible given the initial search in the leftmost column:

Initial Search	Append using FTS	Append using SAF	Append using DC	Refine using FTS	Refine using SAF	Refine using DC
FTS	No	No	No	No	No	Yes
SAF	No	No	Yes	No	No	Yes
DC or QS	No	No	Yes	No	No	Yes

5.2 Search Card

To search for documents, enter the desired criteria into the Search grid. Select one of the following three buttons to either 1) initiate a new search, 2) append to previous search, or 3) search within previous search.

1) To initiate a new search, enter search criteria and click the Search button.

Note: By inserting an asterisk into any field, you can initiate a search for all documents. Such a broad search can take a substantial amount of time if you have a large number of documents stored in your database. To reduce the size of the search, enter specific criteria.

The results of the search are placed in the results area. This replaces the previous contents of the results area. After you have performed a Search and you have documents listed in the results area, you can either start a new Search or modify the existing results by using the append or search previous buttons.

There are two ways to modify your existing search results. You can add more results to the existing results. This is called "Append". You can remove documents from the current results. This is called "Refine".

Note: To understand when Append and Refine are available refer to the Adept Search Matrix.

Clear discards all the search criteria in the current Search grid and clears the Search Results window.

Search Current Card

You can use the "Search Current Card" to search in any character field on the displayed Search Card, including all tabs of the Search Card. So for example, when you type "gear" in this box, the results area will show all documents containing the word "gear" in any character field.

As in other searches, you can use the "*" or "?" character to define the string for which you are searching. For example, typing "A*D" in Search Current Card would find documents that contain "Acad" or "AutoCAD" in any field on the card. Searching "A??B" would result with documents that contain "AXXB" but not "AXXXB"

Differences Between Search Current Card and Other Search Fields

- Unlike other search fields, typing into "Search Current Card" will look for the string contained anywhere in any field on the card. So if you type "Acme", it will find records with the document name "Acme99" as well as "99Acme".
- After a search which contains "Search Current Card", you cannot append to previous search or search within previous search.
- "Search Current Card" does not search in fields of type Logical, Numeric, or Date

Searching using Restricted and Related Fields

You can type into a Restricted Field when searching but not in a Related Field.

5.3 Special Searches

There are special characters you can use to build up sophisticated search criteria.

The following symbols may be typed anywhere in the search string:

- * This wildcard indicates any set of characters in this position.

The following symbols must be typed only as the first character of the search string:

- + Field is not empty
- ` Field is empty. This is a back-quote.
- > Field value is greater than the following
- < Field value is less than the following
- = Field exactly matches the following
- ! Field does not contain the following
- ^ Field does not begin with the following

For example, if you type the following in a field:

- + will return results for which this field is not empty
- *smith searches for all records that contain the string "smith" red*green will return results "red orange green" or "red doesn't look much like green"

Additional Rules

- Some search terms behave differently depending on the type of field you are searching. When searching for text fields, for example, any letters you type in the field will be

- assumed to be the beginning of the string. So if you search a character field for "Draw" it will return any field that begins with those characters. Numeric fields do not follow the "Begins with" convention so if you type the numbers "12" into a numeric field it will only return exact matches.
- When searching date fields there is a special user interface that allows you to search for a range of dates. The only search key symbols you can use in date fields are the + for "field is not empty" and the ` for "field is empty."
 - When searching a Memo field, type in a word you are looking for. Do not use wild cards.
 - To see all the records in the database, use a "+" in the Filename field as your only search criterion. This searches for all documents with a non-blank Filename. The resulting Search Results contain an accurate list of all documents in the database that contain information and have not been deleted.
 - When you type search criteria into any field, the search criteria is shown at the bottom of the Search dialog.
 - When searching numeric fields (system or custom) using the special search character "!" or "^", any results returned will be inaccurate. Those two special characters are not functional for numeric fields and should not be used.. All other special characters should return accurate search results.

5.4 Search Document Content - Full Text Search

Using the Full Text Search (FTS) capability, you can search through the textual contents of documents. To access this feature, click the Search button, and select Full Text Search from the drop-down list at the top. A second drop-down list labeled "Target" lets you specify whether to search the Current Database or the Version Database which contains previous versions.

What data is included in Full Text Search

The Libraries which have the Full Text Search option is enabled are the only libraries searched. (Library Administrators see the Library Profile for more information.) The extensions of documents that are included or excluded from this search are set Options by the Admin. You must have library access rights to be able to search for text within documents in a given library.

To be included in this search, the data must be stored in the document as text. Not all text in a document is searchable. Consider these three situations in which you can see text in the document, but cannot use FTS to search for it:

1. Text that is shown in a raster image such as a scanned document or fax cannot be extracted and therefore, it is not searchable.
2. If the document has been password protected, the extraction tool will not be able to access the text data and as a result, such documents will not be accessible with Full Text Search.
3. Text in a DWG document that was generated with a shape font and then converted to PDF cannot be extracted. If you have DWG documents that you are going to convert

to PDFs, you can use the Publish to Adept product. To read the documentation for that product, see the Adept PublishWave Installation and Configuration Guide.

FTS Basic Searches

Adept FTS supports basic searching with single and multiple words. Words and phrases in double quotes assumes an AND operation.

Searching using "blue" returns all documents with the word "blue".

Searching using "blue sky" returns all documents with the phrase "blue sky".

FTS Wildcard Searches

Adept FTS supports single and multiple character wildcard searches within single terms (not within phrase queries).

- To perform a single character wildcard search use the "?" symbol.

- To perform a multiple character wildcard search use the "*" symbol.

The single character wildcard search looks for terms that match that with the single character replaced. For example, to search for "text" or "test" you can use the search: te?t.

Multiple character wildcard searches look for 0 or more characters. For example, to search for test, tests or tester, you can use the search: test*.

You can also use the wildcard searches in the middle of a term: te*t to search for "text" and "terret".

*Note: You cannot use a * or ? symbol as the first character of a search in the Search FTS field.*

FTS Fuzzy Searches

Adept FTS supports fuzzy searches based on the edit distance algorithm. To do a fuzzy search use the tilde, "~", symbol at the end of a single word search term.

For example, to search for a term similar in spelling to "roam" use the fuzzy search: roam~ This search will find terms like foam and roams.

FTS Proximity Searches

Adept FTS supports finding words are a within a specific distance from each other in a document (distance as measured by number of words between). To perform a proximity search, use the tilde, "~", symbol at the end of a phrase. For example, to search for a "cad" and "drawing" within ten words of each other in a document use the search: "cad drawing"~10

Boosting a Term

Adept FTS provides the relevance level of matching documents based on the terms found. To boost a term use the caret, "^", symbol with a boost factor (a number) at the end of the term you are searching. The higher the boost factor, the more relevant the term will be.

Boosting allows you to control the relevance of a document by boosting its term. For example, if you are searching for: cad drawing and you want the term "cad" to be more relevant, boost it using the ^ symbol along with the boost factor next to the term.

You would type: cad^4 drawing This results in documents with the term "cad" appear more relevant.

You can also boost Phrase Terms as in the example: "cad drawing"^4 "cad document"
The default boost factor is 1. Although the boost factor must be positive, it can be less than 1 (e.g. 0.2)

Boolean Operators

Boolean operators allow you to combine terms using operators. Adept FTS supports AND, "+", OR, NOT and "-" as Boolean operators. If there is no Boolean operator between two terms, the OR operator is always used by default. OR links two terms and finds a matching document if either of the terms exist in a document. You can use the symbol | in place of the word OR.

To search for documents that contain either "cad drawing" or just "cad" use the query: "cad drawing" cad or "cad drawing" OR cad

Note: Boolean operators must be ALL CAPS.

- AND - The AND operator matches documents where both terms exist anywhere in the text of a single document.

To search for documents that contain "cad drawing" and "cad document" use the query: "cad drawing" AND "cad document"

- NOT - The NOT operator excludes documents that contain the term after NOT. To search for documents that contain "cad drawing" but not "cad document" use the query: "cad drawing" NOT "cad document"

- OR - The OR operator matches documents where either terms exist after OR.

To search for documents that contain "cad drawing" or "cad document" use the query: "cad drawing" OR "cad document"

Note: You cannot use the NOT operator with just one term. For example, the following search will return no results: NOT "cad drawing"

FTS Grouping

Adept FTS supports using parentheses to group clauses to form sub queries. You will find this useful if you want to control the Boolean logic for a query. To search for either "cad" or "document" and "design" use the query: (cad OR document) AND design. Using parenthesis in this way eliminates any confusion and ensures that design must exist, and either term cad or document may exist.

How the Full Text Search results are returned

Results will be returned in the Search Results window. The Full Text Search results are returned in the order of the most relevant match first. Those at the top of the list will most closely match what is being searched for. The order is based on a comparison between the number of instances of the matched word, versus the size of the document. In FTS results in the Search Results Tree, there is an additional rank column with a green dot to specify the relevance. Sorting is not allowed by the rank column. If you sort by any other column, this order is rearranged and the most relevant documents might not be at the top of the list anymore.

Library Access Rights

The results will obey the usual rules for controlling access to documents:

- You must have sufficient Library Access Rights to authorize you to view the document . It must be in your current Library Set.
- The document obeys Information Source rules for choosing between Work In Progress (WIP), and documents in the library.

5.5 Append to Previous Search

When you are searching through your database for a particular document or set of documents, you may need to append your search. The Append command adds new search results to your previous search results.

You can start an Append only when you have search results from a previous search. To perform an Append, enter your search criteria and select Append.

Note: Refer to the Adept Search Matrix for more details about refining and appending searches.

For example, suppose you have just finished a search for a DWG document in the Acme Project and you realize your search results are too narrow. You want to add all the DWG documents from the Zenith Project. To perform an Append search:

1. Clear the previous criteria by clicking the Clear button.
2. Add the new criteria for the new search.
3. Click the Append button.

After this Append, the Search results now contain all the documents that were in the first search as well as those that were in the second search. In other words, all the DWG documents from the Acme project and all the DWG documents from the Zenith Project.

You can continue to Append to Previous Search as many times as you need to. You can also perform a Search within previous Search to search only those documents that are in your current Search Results, or perform a New Search to replace the Search Results with the new search.

5.6 Search within Previous Search

When you are searching for a particular document or set of documents, you may find it advantageous to do a series of searches. Start out with a broad search, then hone in on the one you want by doing a search within the results of the previous one. The Search within Previous Search, or Refine Search, searches through the previous results using new criteria.

To start a Refine Search, select the Refine button. This command is enabled only when there are already search results available.

For example, suppose you just finished a Search for a DWG document in the Acme Project and you realize your search results are too broad. You want to search through your current search results. To perform the new search on the documents that are currently in your search results:

1. Clear the previous criteria by selecting the Clear button.
2. Add your new criteria. In this example, add a range of dates.
3. Click the Refine button.

After this Refine, the search results now contain only those documents that were in the first search that match the new criteria. In other words, all the DWG documents from the Acme project that were created within the specified range of dates.

Note: Refer to the Adept Search Matrix for more information about when a refine search can be executed.

You can also perform an Append Search to append additional documents to your current search results or perform a new search to replace the search results with the new search.

5.7 Search for Children

You can find the children of a document by selecting the document and selecting the Search for Children command. This search will list all the children of this parent in the results area.

Note: The results returned by the Search for Children command can be influenced by the Maximum Display limit which is set by the administrator in the Relationship tab of the Options dialog. If Search for Children reaches this limit before it calculates all children, the returned search results will be truncated. To ensure that Search for Children returns the complete results, make sure that the Maximum Display limit exceeds all relationship counts. However, do not set the Maximum Display too large, or disable the limit. In cases of extraordinarily large assemblies, this could create a situation where the Adept workstation or server run out of memory. Synergis suggests the number not be set greater than 100,000.

The number of children returned by Search for Children is affected by the options: Stop at

AutoCAD Overlays, Stop at SOLIDWORKS In Context References, Stop at Inventor Substitute References and Stop at MicroStation No Nesting References. These options reduce the number of children that are shown in the Document Dashboard tree and the number of children that populate Adept's Virtual Library. In cases where you are searching for the children of a document with one of these references, enabling the Stop At option will reduce the time it takes to perform the search and makes it less likely you will reach the limit of your Maximum Display.

Another way to find children of a single document is to select the document in the Search Results, FileGuide, or Work Area window and view the results in the Document Dashboard.

5.8 UTC Date Considerations

UTC stands for Universal Coordinated Time and is also referred to as GMT, or Greenwich Mean Time. All Adept System date fields are in UTC, however the custom date fields of Adept are **not**. Using a Date field in Adept to search with can produce unexpected results in some cases. This is especially true when using the date range search widget since our search mechanism does not consider time when displaying results. So depending on the

time zone you are currently working in you might receive results that are within the time adjustment for Greenwich Mean Time.

6 Data Cards

6.1 Data Card Introduction

The data card is an on-screen form that displays the information stored in Adept's database and, where appropriate, allows you to enter additional or edit existing information. A data card shows you detailed information about one document at a time. Each data card can contain up to 8 pages of custom information plus a page for a memo field and a page for a thumbnail. The different pages of a multiple page data card are viewed by clicking the tabs that on the card.

To select the document for which you will see the data card, select from any Adept window. Once the data card is displayed you can click the left and right arrows at the top of the card to navigate to the previous or next document in the list you are currently viewing.

Selecting a Data Card

If you have been authorized to select a customized data card you can do so from the drop down box at the top of the data card. Customized data cards are designed by your administrator to show those fields in the database that are relevant to a particular purpose. Because in some settings some information may be restricted, the administrator can set the User Profile so particular users can access only one data card. If you are not permitted to choose data cards the drop-down list is hidden.

Rules About When You Can and Can't Edit Data Card Fields

To edit a data card that is IN, you must have the library access rights to Edit Data Cards in Library. No matter what your library access rights are, you are entitled to edit data cards of documents that you have created and are NEW, OUT, or DUPLICATE to you. If you are an administrator you can also edit a data card that is checked out to a different user.

- **System Fields:** You can never edit System Fields. System fields are used by Adept and cannot be directly edited.
- **Protected Fields:** If a field is Protected. you can edit it only if you have rights to Edit Protected Fields.
- **Restricted Fields:** Restricted Value Fields allow only certain values to be entered. These fields have a drop-down box that displays the list of available values. The administrator provides the values in a restricted value drop-down box by entering them in the Administer Database Fields dialog available by selecting the Database Fields command on the System tab on the ribbon bar. If you have Workflow Manager level rights or higher, you have access to the override rights option in the context menu. This option allows you to input a value that is not on the restricted list and have that value populated into the data cards. This does not put the entered value on the restricted list.
- **Extraction fields filled in automatically:** Extraction fields are those fields that Adept uses to pull information in from document properties and attributes. When the administrator sets up extraction fields, each field is mapped to properties or attributes in a particular

document type. Generally, extraction fields are filled in automatically by Adept using information it pulls from documents.

- **Related Fields:** If a field is related, making a selection in one field influences the choices available in subsequent fields that are related.

Editing Extraction fields

Under some circumstances you can edit extraction fields. This might happen if the field you are working on isn't mapped to an attribute or property in the current document, if you have extraction turned off for the current document type, if you are viewing a document such as a GIF or JPG that does not have an active extraction option, or if you override rights. See the topic on Extraction Fields for more information.

Save your changes

After you change an editable fields on the data card you can save your changes immediately by selecting the Save command or you can wait until you close the data card and answer Yes or No when asked if you want to save your changes.

Work-in-progress or Library copy of a Data Card

When you view the data card for a document that is Out or on Hold, there are two possible data cards that you can view, either the work-in-progress or WIP copy or the library copy. When you view the library copy you cannot edit the fields. To switch between viewing the WIP or the library copy, check the View Library Copy check box at the top of the data card.

You can also affect the source of the data card by selecting the Information Source in the status bar of the Adept window. This setting only affects the initial display of the data card. You can still toggle back and forth between Library and WIP using the check box at the top of the data card.

6.2 View Data Card

View the data card for a document by selecting the Data Card command. This command displays the Data Card of the selected document. To view Data Cards you must have View access rights to the library where the document resides.

You can make changes to the custom fields in a Data Card if you have the correct library access rights for the status of the document and if no other user has selected the document for an operation (tagged). See Edit Data Card for more details.

The Update Document check box on the Data Card is active only when you have rights to update the document and when no one else is editing the card.

When you are viewing the Data Card for a document that is Out or on Hold/Review, you can choose to view either the working copy or the library copy. The check box is labeled 'View Library Copy' and in some cases, such as when the system field 'In Once' is false, there is no library copy to view and the option will be disabled. To switch between viewing the working or the library copy, click the check box at the top of the Data Card. When you view the library copy of a record that has a WIP copy, you cannot edit the fields on the library copy of the Data Card.

If your User Profile gives you the right to select a different Data Card, you can view the drop-down list at the top of the data card. If you don't have the ability to choose Data Cards, this drop down box stays hidden.

6.3 Data Card: Memo

One tab on the data card is labeled Memo by default. You can type into the memo field in unformatted text or you can paste formatted text and images into it.

Formatting Text in the Memo Tab

Depending on the Adept Client application you are using, the controls for formatting text in the memo field vary. Refer to the application's memo field for on-screen details on the formatting controls available.

Copy and Paste in the Memo Tab

You can copy formatted text from a Microsoft Word or other supported document and paste it into the memo tab using the standard keyboard combination, Control-C, Control-V. The original formatting will in general be remembered depending on the underlying format codes. When you type into the memo tab, the new characters will inherit the nearby formatting. In addition, you can add basic formatting by selecting the text and clicking the, Bold, Italic, or Underline buttons.

Note: Word Wrap is not automatic. To format the end of a line, hit the enter key.

6.4 Edit Data Card

1. Select the document whose data card you want to change. You can select it in any window.
2. Display the data card by selecting Data Card command.
3. You can edit data cards if you have Edit Data Cards Library Access Rights and if the card is not currently being edited.

Note: When you are viewing an editable data card, Adept automatically tags (locks) the document so that no other user may edit the data card during that time. Only nonsystem fields may be edited. System fields such as document name and library cannot be edited. You can only edit Protected Fields if you have Edit Protected Fields rights. Text that you can edit is active and text that you can't edit is inactive (gray).

4. Use the mouse to move from field to field, making desired entries as you go.
5. Press the Save button at the top of the data card anytime to save your changes in the database, or Cancel to exit without saving further changes.

Note: You can use the keyboard tab key to move from field to field. The cursor moves, starting from the top left corner, across and down the card. There is no mechanism to specifically order the fields for tab movement

You will not be permitted to edit the data card when:

1. the document is tagged by another user
2. the document is checked out by another user
3. the document is assigned to another user, unless you are the last owner

4. the document is checked in and you do not have Library Access Rights to edit data cards in that library

You will be permitted to edit the data card:

1. If you are an Admin. An Admin can edit a data card, even if the document is out to another user.
2. Regardless of Edit Data Card rights, you can edit a data card when the document is in your work area with a status of OUT, NEW or DUPLICATE.

6.5 Cannot Edit Data Card

Here are potential reasons why you can't edit a data card:

Cannot edit the Data Card at all

You need Edit Data Card in Library rights in this library to edit a data card. In some cases the Admin has set up library editing access so that users can't edit library cards with the status of In. Another user may have the document record locked or tagged. There are several ways a document can be tagged. If a user is currently editing or viewing the data card, it becomes tagged, and no one else can edit the data card.

Cannot edit some fields

Some fields of the data card are editable, and some are not. You can visually distinguish editable from non-editable fields. Fields that you can edit are active (text is darker black) and fields that are non-editable are inactive (text is lighter gray).

System Fields

You can never edit System Fields, such as Document Size or Adept Date.

Extraction Fields

Extraction fields are generally meant to be read-only fields. They contain data that was extracted from a supported document, such as Microsoft Word, AutoCAD, Inventor or SOLIDWORKS. In some document formats you can also update the document. To use this feature, if you have the appropriate right, you can select the Update Document check box on the data card. The extraction fields will then become editable. You can also edit extraction fields if the integration for this document type doesn't exist or is turned off. For example, you can edit an extraction field if the data card is for a GIF, because Adept does not extract properties from GIF's. You can also edit an extraction field for a document if extraction for that document type is disabled. For more details see Edit Extraction Fields.

Restricted and Related Fields

To enter data into a Restricted or Related Field you are only permitted to choose from among the available values that are presented in the dropdown list. These were entered by the Admin when setting up the Restricted or Related Field value list. You cannot type into Restricted or Related fields when editing a Data Card.

Protected Fields

You must have Library Access Rights to Edit Protected Fields except in New or Duplicate documents.

7 Work Area

7.1 Work Area Introduction

Your Adept Work Area is an area where you create and edit documents that are work in progress. You can attach the work area to a folder, whether on your local drive or a network drive. When you check out a document from a library, Adept creates a copy in your work area. You can open the appropriate application on this copy while the original is stored safely in the library.

When you create new documents, you can create them in your work area. You can also copy duplicates of library documents to your work area using Adept's Copy command.

To help you organize your documents that are work in progress, you can have as many work areas as you want. When you add a new work area, you can specify the path by browsing. If you have more than one work area, you can switch between them by simply clicking the name of the appropriate work area in the Work Area window.

You can type in a label to remind you of the purpose for a work area. The label will be displayed instead of the path or folder name.

Note: The folder is the name of the folder on the disk.

For rapid exchange of documents in a work-group environment, you may choose to establish a Shared Work Area.

Your individual work area is on the local drive or on an area of the network drive. The advantage of putting your work area in a network folder is that you can use it from any workstation that you log into and it can be backed up by your routine network backup procedure.

Note: Two users should never define their work areas to point to the same folder unless this will be administered as a Shared Work Area.

You have substantial control over your own work areas. You may create new work areas, copy documents from one work area to another, delete new documents from work areas, and remove work areas.

If for some reason your work area becomes detached from its disk directory, you can easily "re-path" the work area. To do so, edit the name of the work area you want to change. This allows you to browse to the folder you want to attach to this work area.

For more information, please see the Work Area topic.

7.2 Current Work Area

When you are in your work area window, you can select any work area by clicking on its name in the list on the left of the window. When you select a work area, it becomes the current or active work area.

7.3 Add Work Area

To add a work area, use the Add Work Area command.

Typically work areas should only be accessible to you, so set up work areas locally or in a protected folder on the network.

Note: Under certain circumstances you may want to set up a Shared Work Area. These must be located on a network drive. A network Work Area can only be designated as a Shared Work Area from within the Adept Desktop Client application but will be accessible as a Shared Work Area from the Adept Web Clients.

You can have as many work areas as you need. For example, keep a separate work area for Projects, Drawings, Correspondence, or any other method that helps you stay organized.

When you have documents in the folder where you create the new work area, Adept automatically synchronizes each document. That is, it creates a database record for each file, creating an Adept document. For any document type for which Adept supports extraction, Adept extracts properties and attributes, and tries to resolve xrefs and external parts.

7.4 Edit Work Area

Change the name or path of an Adept Work Area by selecting the Edit Work Area command. To change the path click the Browse button.

If there are documents in the work area being edited, Adept will ask you if you want to move them. If you have documents checked out to the work area, you may prefer to check them in before performing this operation.

The optional label is available to help you identify the work area. You can edit this label if desired.

7.5 Remove Work Area

You can have as many or as few work areas as you need to manage your work in progress. When you remove work areas, only the Adept reference to the directory is removed from the Adept environment. The underlying documents and directory remain on the disk, untouched by the remove work area command.

If there are documents in the work area that were checked out from a library, you must check the documents in before you can delete the work area. If there are missing documents in the work area, that is, documents that were checked out to the work area and then removed from the folder, you will need to repair the missing document by either Release Check Out or by replacing the document from a backup.

7.6 Work Area No Longer Valid

When a work area is no longer valid, Adept displays a red cross through the work area's icon in the Work Area window.

There are several reasons why a work area may not be valid. Here are some typical reasons:

- You deleted or renamed the underlying folder.
- You are logging in to Adept on a workstation that is different from the one where you have defined your work areas.
- You have defined a work area on a disk that is no longer accessible to your machine.

When you have no valid work areas, you may not be able to complete some important Adept functions. For example, checking out documents always requires a valid work area.

You can correct this situation by defining new work areas or by pointing an existing work area to a new path. To point your work area to a new location, edit the work area.

8 New Documents

8.1 Create New Documents

Adept creates new documents by copying the Template or Start Document that has been stored in Adept by the administrator. You can also create Unlinked Records.

Type in a name for the new document. Select the template document to be copied by choosing it from the list called Document Type. This drop-down list shows you the templates that your administrator has made available.

Note: An Adept Template is a document created by an application. For example, an Adept Template could be a DWG document to start an Autodesk drawing or a DOC document to start a Microsoft Word document. Adept Templates are different than the use of "Template" in Microsoft Office products, which refer to the underlying formatting data in a DOT or DOTX document.

Select the work area where you want to create the documents or records.

Select the Type of record you want to create:

- Document
- Unlinked Record

Note: Records that are not connected to a document are called Unlinked Records. You could use Unlinked Records to represent a paper document in your desk drawer, a box in storage, or even just to contain information.

Select the status:

- Document that has been checked OUT from a library
- NEW

New Document or Unlinked Record in Current Work Area

Any user may create a new document or unlinked record in their work area. When you set the Document Type to Document and you set the Status to New, Adept copies the appropriate template document into the selected work area and gives it the name you choose. When you set the Document Type to Unlinked Record, no document is copied. The status of the record is NEW.

New Document or Unlinked Record Checked out from Library

To create a new document or unlinked record, checked out from a library, you must have at least Edit Library Access Rights in this library. The status of the document or record is OUT. When you set the Document Type to Document and the Status to Out from Library, Adept copies the appropriate template document into the selected work area and gives it the name you choose, setting the status to OUT from the library you select. In this same scenario, with the Document Type set to Unlinked Record, an unlinked record with no document is created with a status of OUT from the library you selected.

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Documents checked out from a checked library are assigned the default workflow for that library.

Note: When Adept checks this unlinked record or document out of a checked library, note that it was never actually all the way in the library. It was only in as far as HOLD. (Technical note: the in-once flag is false).

New Documents

When you create a new document from Document New, Adept gives it the Document Type that was established for that application. The document type determines the application that Adept opens when you open this document.

You can also use the Document Copy command to create start-documents. Copy the documents to your work area and use the copied document as a template for a new one. See also: Copy

9 Document Status

9.1 Status

The document status is a field that indicates important information about the document. For example, a Status of NEW indicates the document is not yet in an Adept Library (never checked in). A status of DUPLICATE indicates a new document but Adept has detected another document of the same name already entered in the system. Because of its important role in Adept's system, all Adept windows display the status column.

Possible values of the Document Status:

- Arc
- Assign
- AssignHold
- AssignReview
- Duplicate
- Hold ·
- In
- New
- Out
- Review

9.2 Document Status: ARC (Archived)

ARC means that the document has been archived and is currently stored off line.

The Status column contains ARC/nnn. The characters after the Archive status make up the identifying character string that is entered when the archive is performed. This string can be up to 6 characters.

ARC/ never appears as a status in your Work Area window.

9.3 Document Status: Assign

A status of ASSIGN means that the document has been assigned to the user whose name appears in the Owner field.

You can check out a document that is Assigned to you.

A document can be Unassigned by:

- The person to whom the document is assigned
- The person who assigned the document
- A Workflow Manager in that library
- Any Administrator

ASSIGN never appears as a status entry in your work area.

9.4 Document Status: AssignHold

When a document is checked in to a Checked Library, it is moved from the Work Area to the Holding Area. Documents in the Holding Area may have one of four statuses: Hold, Review, AssignHold, and AssignReview.

The AssignHold status indicates that this document is currently in a Workflow Step for which you are NOT a Reviewer and it is also Assigned. The user to whom the document is Assigned is indicated by the name in the Owner field. Add an Owner column to your display to see who owns documents on AssignHold. The person to whom the document is assigned can check out the document or unassign it.

Note: If it is Assigned and awaiting for review by you, it has a status of AssignReview.

When a document status is AssignHold, there are at least two copies in existence; the master copy in the Library and one or more Work in Progress copies in the Holding Area. When you View a document whose status is AssignHold, Adept must decide which one to send to the Viewer. This decision is based on the state of the Information Source, Library or WIP. You can change the Information Source by clicking on it in Adept's Status bar.

Not all users have the right to View documents with a status of AssignHold. This right is granted to users in the Library Access Right called View/Resolve to WIP.

Documents with a status of AssignHold may be assigned or approved by a Reviewer or checked out by the Last Owner, or by the user to whom they are currently assigned.

AssignHold never appears as a status entry in your Work Area.

9.5 Document Status: AssignReview

When a document is checked in to a Checked Library, it is moved from the Work Area to the Holding Area. Documents in the Holding Area may have one of four statuses: Hold, Review, AssignHold, and AssignReview.

The AssignReview status indicates that this document is currently in a Workflow Step for which you are a Reviewer and it is also Assigned. The user to whom the document is Assigned is indicated by the name in the Owner field. Add an Owner column to your display to see who owns documents on AssignReview. The person to whom the document is assigned can check out the document or unassign it.

Note: If it is Assigned and awaiting for Review by others, not by you, it has a status of AssignHold.

When a document status is AssignReview, there are at least two copies in existence; the master copy in the Library and one or more Work in Progress copies in the Holding Area. When you View a document whose status is AssignReview, Adept must decide which one to send to the Viewer. This decision is based on the state of the Information Source - Library or Work In Progress. You can change the Information Source by clicking on it in Adept's Status bar.

Not all users have the right to View documents with a status of AssignReview. This right is granted to users in the Library Access Right called View/Resolve to WIP.

Documents with a status of AssignReview may be assigned or approved by a Reviewer or checked out by the Last Owner, or by the user to whom they are currently assigned.

AssignReview never appears as a status entry in your Work Area.

9.6 Document Status: Duplicate

The status of Duplicate only appears in your Work Area, and indicates that a document with the same document name appears somewhere in a Library.

Depending on the option your Admin has set for unique document names, you may find this is duplicate in more than one Library.

A document that you copy from the Library or Version Area appears in your Work Area with a status of Duplicate unless you rename it and give it a unique name. If you rename a Duplicate document to a unique name, the status changes to NEW.

A Duplicate document is not controlled in Adept and you may delete it from your Work Area.

If you have edited a document with a status of Duplicate and you want to check in the document to a Library that contains a document with the same name, you can do so with the Acquire Check Out command. Executing this command changes the status to Out and allows you to check the document into the same Library. Be aware that when you check in the document, it creates a version of the document currently in the Library.

Duplicate never appears as a status in the Library.

9.7 Document Status: Hold

When a user checks in a document to a Checked Library, it is removed from the Work Area and placed in the Holding Area. When documents are in the Holding Area, they may have one of four statuses: Hold, Review, AssignHold, and AssignReview.

When a document status is Hold, there are at least two copies in existence; the master copy in the Library and one or more Work in Progress copies in the Holding Area. When you View a document whose status is Hold, Adept must decide which one to send to the Viewer. This decision is based on the state of the Information Source, Library or WIP. You can change the Information Source by clicking on it in Adept's Status bar.

Not all users have the right to View documents on Hold. This right is granted to users in the Library Access Right called View/Resolve to WIP.

Documents on Hold may be assigned or approved by a Reviewer or checked out by the Last Owner, or by the user to whom they are currently assigned. When a document on Hold is also assigned, the status changes to AssignHold.

Hold never appears as a status entry in your Work Area.

9.8 Document Status: In

A status of In means that the document is currently in its Library and is available to be checked out.

In never appears as a status entry in your Work Area.

9.9 Document Status: New

A New status indicates a document that has never been checked in to a Library. New documents only appear in your Work Area. Adept creates a temporary copy of the Data Card. The information from this Data Card is copied into the database when you check in the new document.

New never appears as a status entry in a Library.

If you rename a New document to have a name that appears in the database, the status is changed to Duplicate.

9.10 Document Status: Out

In a Library, a status of Out means that the document is currently checked out to the user whose name appears in the Owner field.

In your Work Area, a status of Out means that the document originated from a Library - it is not a new document. The Owner column always contains your name.

9.11 Document Status: Review

When a document is checked in to a Checked Library, it is moved from the Work Area to the Holding Area. Documents in the Holding Area may have one of four statuses: Hold, Review, AssignHold, and AssignReview.

The Review status indicates that this document is currently in a Workflow Step for which you are a Reviewer. If the document is also Assigned to you, then the status is AssignReview.

When a document status is Review, there are at least two copies in existence; the master copy in the Library and one or more Work in Progress copies in the Holding Area. When you View a document whose status is Review, Adept must decide which one to send to the Viewer. This decision is based on the state of the Information Source, Library or WIP. You can change the Information Source by clicking on it in Adept's Status bar.

Not all users have the right to View documents with a status of Review. This right is granted to users in the Library Access Right called View/Resolve to WIP.

Documents with a status of Review may be assigned or approved by a Reviewer or checked out by the Last Owner, or by the user to whom they are currently assigned.

Review never appears as a status entry in your Work Area.

10 Extract Documents

10.1 Extract Data - Overview

What data does Adept extract from documents?

Attributes and Properties

Currently Adept Web Client extracts information from Autodesk documents (DWG and DST), SOLIDWORKS, MicroStation (DGN), PDF, and Microsoft Office Word and Excel. Thumbnails can be extracted from some image documents. Adept cannot extract or update password protected AutoCAD documents.

Note: DWG documents created by Inventor are different from DWG documents created by other Autodesk applications. Adept's AutoCAD extraction cannot extract DWG attributes, Xref information, or Overlays from DWG's created by Inventor, even if you later edit the document in AutoCAD. The Adept extraction for DWG documents created by Inventor is limited to only extracting and updating information added by Inventor and extracted by the Adept Inventor extraction.

Note: When extracting properties from Microsoft Office Word or Excel, the workstation that performs the extraction must have the appropriate application installed, as well as the PlugIn for Microsoft Word or Excel.

Relationships

For Autodesk DWG, MicroStation, and SOLIDWORKS documents, Adept extracts the interdocument relationships among external references, parts, and assemblies, as well as Autodesk external image documents.

Note: In addition to relationships that Adept extracts from CAD documents, you can also create manual relationships among documents of any type.

Thumbnails

If a supported document contains a thumbnail preview, Adept can extract it and make it available so users can view it in Adept without needing to open the application. Adept tries to extract a thumbnail from any document for which you have turned on either the option to extract thumbnails.

To extract properties, attributes, and tags, you must create appropriate fields in Adept. These fields, called Extraction Fields, will contain the data that is extracted from the supported document. After you create each extraction field, you must map it to a particular document type and attribute or property name. So for example, an Adept extraction field named "ProjLead" is mapped to an SOLIDWORKS Property named "Project Leader" and the value in this Adept field will be pulled into Adept when the information is extracted from that document.

To make this process easy Adept can scan the document or documents that contain samples of these attributes or properties and presents this scanned list to you. When you want to map the item from the document, you can simply point at the scanned list and click.

Note: When you use the Clear Extracted Data command, all data from extraction fields is deleted, regardless of whether it was entered by typing or by extracting from the document.

Extract System Data (Date/Time/Size)

When Adept extracts data from a document, for example when you check it in, the system information of Date, Time and Size are extracted and stored in the database. Adept relies on an exact correspondence between the Date/Time/Size stored in Adept's metadata, and the Date/Time/Size stored in the document's record in Windows.

However, if a user opens and saves the document directly from the operating system, the data on the operating system changes, but the data in the Adept database does not. As a result, data in Adept no longer matches the data in Windows. When you copy out or check out such documents, this mismatched condition is flagged as an error condition. To repair these mismatch errors, search for documents with a mismatch, and then perform an extract.

Extracting Text for Full Text Search

When the system is set up for Full Text Search and the library from which you are extracting is enabled for Full Text Search, text data from the file is extracted, when possible.

When does Adept automatically extract data from a document?

Here is a summary of conditions when Adept automatically extracts information from supported documents.

Note: All Adept extraction obeys the options you have set in the appropriate options dialogs.

In a work area, data is extracted from documents, when:

- Selecting a work area and a document in it is seen for the first time
- The work area is selected and a document in it is not new, but is still in a "raw" state (For example, it would be "raw" if it was synchronized with extraction options turned off)
- A document's last save time has changed (ex. Save changes to a document in a work area)
- You create a new work area in a directory that contains documents

In other areas of Adept, data is extracted from documents when:

- Documents are dragged into Adept from Windows Explorer
 - A document is selected and then the Refresh All command is selected
 - A document is checked in ·
- A library is synchronized

Troubleshooting Extraction

If Adept does not seem to be extracting data from a document, review the details in Reextract to troubleshoot and resolve your issues.

10.2 Refresh Extracted Info

In some situations, Adept may not have completely extracted all document information or for some reason, you may have cleared the information that was extracted. In these cases, you can manually cause the re-extract by issuing a Refresh Extracted Info command.

When you might need to force a "re-extract":

- If Adept started to extract data from a document and then was interrupted before extraction was complete -- this might be a general computer crash or failure or a "corrupt" or "bad" document.
- If when you first synchronized your library or when you checked in a document, you had extraction options turned off.
- Unresolved part or Xref: If, during the Synchronizing process, Adept is unable to locate an externally referenced Part or Xref, the document will have an unresolved part or Xref.
- Editing documents directly at the Document System: If network rights allow users to edit or replace documents "under the hood" some attributes and system fields might be different between the document and the Adept database. (This should never be allowed, but if it is, re-extracting the document will correct the mismatch.)
- Mismatched System Fields: Under some circumstances, such as when documents have been editing directly at the operating system, the system field information in Adept no longer matches the system data in the document's record in Windows. If you check out the document and check it back in, this mismatch will be corrected automatically. Under some circumstances, when the document is copied out to the Virtual Library without being edited, an error condition will be generated.

Note: When Adept first starts to extract, the Extraction State is noted in the database and when extraction is completed, this state is changed. To determine any documents that have failed during the extraction process you can search for the values in this field.

Note: This command is only available for documents with an Adept Status of Out (to user), New, or Duplicate. To perform this command on Documents with any other Adept Status, log into the Adept Desktop Client where this command is available.

- Blank field: Document has not been extracted or is not extractable
- In Process: Extraction was attempted but failed for some reason
- Extracted: Document was successfully extracted

To manually force Adept to extract data, first select the document(s) and then select the Refresh Extracted Info command on the Document tab of the ribbon. This command performs the same task that is automatically performed every time you check in or synchronize a document.

To determine which documents failed extraction

Adept sets the Extraction State whenever it extracts data from a document. Because of the flags set by Adept during the extraction process, it is possible to evaluate which documents have been successfully extracted. You can simply add the column Extraction State and review the values for each document.

10.3 Extraction State

Adept sets the Extraction State whenever it extracts data from a document. Because of the flags set by Adept during the extraction process, it is possible to evaluate which documents have been successfully extracted and which have not by following the instructions below. Or you can find them all by selecting the Failed Extraction command on the Search tab.

Extraction State is set as:

<u>Status text string</u>	<u>Meaning</u>
Blank (no value)	Never extracted
Extracted	Extraction succeeded
In Progress	Extraction not yet succeeded

Note: You can search for "never extracted" fields by using the back-quote character ' in the search field. This indicates blank.

When Adept starts to extract data from a document, a flag is set in the database record indicating that the extraction has started.

To find documents that need extraction

There are several ways to search for documents that need extraction. Use one of these methods:

1. Select the Failed Extraction command on the Search tab.
or
2. Create a data card that contains Extraction State.
or
3. Use the Quick Search feature at the top of the Search Results window. Use the Extraction State to home in on documents that have not been successfully extracted. or
4. Right-click in the Search Card and from the Special Searches flyout select "NeedsExtraction. This includes documents in which the Extract State is blank (never been performed). Once you set the special search for "needs extraction", you can add other search criteria to narrow the search to a specific set of documents.

10.4 Clear Extracted Info

You may occasionally need to remove extracted data from your Data Card. To do so, select the Clear Extract Info command on the Document tab of the ribbon.

Select the type of data you want to clear in the dialog. When you click OK, all such data from the selected documents is removed from Adept's database.

Note: You are only permitted to perform this operation on documents for which you have the Library Access Right right to Update Documents.

Note: This command is only available for documents with an Adept Status of Out (to user), New, or Duplicate. To perform this command on Documents with any other Adept Status, log into the Adept Desktop Client where this command is available.

Fields

This clears all extracted fields that are related to these documents, including attributes, properties, or any other value associated with an extraction field.

Note: When you clear fields in this way, Adept will delete values, whether they were extracted from a document or entered through the Adept Data Card.

Note: This does not push the blank field out to the document. To delete the value from the document, insert a ` (back quote) character in the field and then with Update Document selected, click Save.

Relationships

All extracted relationships associated with these documents will be deleted. In addition to the relationship itself, you will also remove the setting for whether you wanted this relationship to be Fix, Float, or Dock. The next extract will use the default relationship type.

Note: This does not clear relationships you created with the Create/Edit Relationship command.

Note: In previous versions of Adept, "Clear Relationships" was an option in the Re-extract command. In Adept 6 and beyond, re-extract does not clear data. You are now required to clear it with the Clear Extract Info command, found on the Tools tab of the ribbon.

Note: Clearing the relationships of a document does not clear the glyphs of the children. While Adept continues to accurately track the relationships among the documents, the child's glyph remains stuck. To clear such glyphs, run the Index for Parents and Children command from the System tab>Maintenance>Miscellaneous pull down menu.

Thumbnails

All thumbnails are deleted from the Adept database for these documents. You can use this to reduce the size of your memo tables.

Extraction State

Delete the Extraction State if your synchronize was terminated or if there were other issues that allowed documents to be improperly extracted.

11 View/Print Documents

11.1 View Documents

All Adept library access groups have the ability to view documents, at a minimum. If you are in a group that has View Library access rights, you can view any selected document in that library from Adept. If you have Redline Library Access Rights, you can redline any document in the viewer. If you have Print Library Access Rights you can plot or print a document.

To perform these operations, select the document(s) and then select the View Document command.

If you are viewing a document that is OUT or on HOLD, Adept must decide whether or not to show you the document that is in the library or the one that is a work in progress. To make this choice, Adept relies on the setting of the Information Source. If you have Information Source set to WIP, Adept will show you the one out to you. Or if you have the right to View/Resolve to WIP, Adept will show you the one on Hold. If you have the information source set to Library, Adept will show you the one that is in the library.

If the document is WIP and it has several minor versions, you can select any of the WIP minor versions from the WIP tab in the Document Dashboard. To display these WIP versions, select the document in the FileGuide, Search Results or Work Area. Then select the WIP tab in the Document Dashboard. In that list you can select the minor versions you want to view. Then select them and select View Document.

Note: In some situations, Adept shuts the viewer down. When you are viewing a document that is OUT and you check it in or you rename or move it, the viewer automatically closes.

You cannot edit or alter the document in Adept's viewer. The viewer allows you to zoom in and out; pan; turn drawing layers off and on as well as plot or print the current document view. Users who have the Library Access Right can convert the document to another format by using the Convert command from the viewer's File menu.

To learn more about the details of the viewer, click the Help menu in the viewer or see the Adept Viewer Documentation.

11.2 View Document: Library or Work In Progress (WIP)

If the document you are viewing has a status of OUT or HOLD, Adept needs to decide whether to display the Work In Progress copy or the one that is IN the library.

If you have the Library Right to View/Resolve to WIP, you will be able to indicate the one you want to see by selecting the appropriate Information Source, Information Source lets you select the version of the document that is in the library, or the version of the document that is WIP.

11.3 Redline Comment

Adept's Viewer has the built-in capability to add comments to documents. You can draw redline sketches and add text notes to pass comments along with a document or to indicate work needed. Adept manages the comment document so for any Adept managed **View/Print Documents**

document, the comments that you added appear whenever the document is viewed in Adept using the Adept Viewer.

The symbol to the left of the document name indicates if a document has a redline. See: Symbols, Graphics, Icons, Glyphs

To see who is the last person to add a redline comment to a document and the time they added it, insert the column Redline Comment to an Adept window or display this field on your Data Card.

Administrators and users with Workflow Manager rights or above can clear the redlines of selected documents by selecting Clear Redlines command.

You can save redlines with Versions, but you cannot edit the redlines associated with Versions. If you want redlines saved in the Version database, be sure the document is returned to the Library and the version is created before you clear the redlines.

Note: If a user has rights to redline a document, they also have rights to edit or delete redline information created by other users and saved with this document.

11.4 Print Documents

To print documents from Adept, select a document in Adept, view the documents, and select Print from within the Viewer. To set Print Options, open the viewer and select Print from the viewer's File menu. Settings you make here apply to any document you print from Adept or print directly from the viewer.

If a document has been checked out, you must choose which copy you want to print, the WIP version or the one that is in the library. Do this by clicking on the Information Source on the status bar.

Column Data and Sets

12 Column Data and Sets

12.1 Change Column Appearance

Column widths can be adjusted to your liking in the results area. Using your cursor, you can drag the vertical bar between columns to adjust each column's width.

12.2 Add Columns, Change Columns

The data associated with each document (linked or unlinked) stored in Adept is displayed in columns in the results area. To specify which columns are displayed in these windows, select the three line icon (hamburger) on the title bar at the far right side. You can drag and drop columns from one side to the other, adding or removing them from the columns displayed in the results area.

Note: The number of columns directly impacts performance when refreshing the window.

Note: Columns can be dragged and dropped within the column header to reorder the columns as displayed.

12.3 Column Sets

Column sets allow the user to use, save and edit a particular set of columns in Adept's windows. See the results area topic for details.

Note: Currently, Column Sets can only be created within the Adept Desktop Client application. To have a Column Set available to you when using other Adept Client applications, the Column Set must first be created in the Adept Desktop Client application by yourself or by another user who shares the Column Set with you.

12.4 Sort Display by Columns

To help you quickly see the contents of most Adept windows, you can sort the list based on the values in any column. For example, you can sort the window by document size, document date, or filename with a click of your mouse.

To sort the window contents position the cursor on the column heading in an results area and click the left mouse button. This sorts the contents of the entire window according to the values in the column you just clicked on. An up or down arrow appears next to the column label to indicate how it's sorted.

Click on the column heading again to reverse the order of the sort or hold the shift key while clicking the column header to force the reverse sort.

13 Check In/Out & Copy Out

13.1 Check In - Overview

When you are finished working on a document, return it to the library by checking it in. Check in documents by first selecting them in a Work Area, and then selecting the Check In command on the Home or Document tabs of the ribbon. You can also check in documents by dragging them from the Work Area to the FileGuide and selecting Check In from the pop up menu..

For those documents that were checked out of a library, you cannot select a library for check in. Adept returns them to the library from which you checked them out. For any documents in the list that are NEW and have never been checked in to a library, you must select a library for them to be checked into. In the Check In dialog, highlight the documents and select the library from the dropdown list of libraries.

Options

You may see either one or two additional options that affect the behavior of check in. The first option, Keep Out (Check In but keep Checked Out), is always available. The second option, Undo Check Out, may or may not be available depending on how the administrator has set up your site in the Adept Options. See the topic Check In Dialog Box for details.

Checked Library: waiting for Reviewer

When you check documents in to a Checked Library, the documents are moved to a Holding Area awaiting review by the reviewers at this step in the workflow.

Unchecked Library, Return to Library

When you check documents in to an Unchecked or Open library the documents are moved directly back to the library. Documents that are returned to a library either overwrite the previous version, or if you create a Version, the previous library copy is first moved to a Version subdirectory. You can create a version by clicking the Create Version check box. (In Checked Libraries, the Version check box is hidden during check in.). If the library has been set up to automatically create a new version after every check in, a version is created whether or not you check this box.

When you check in Parent documents whose children are also checked out to you, Adept automatically adds these children to the Check In list. Depending on the option, Force children with parent, set by the administrator, you may or may not be permitted to unselect some of these documents.

Note: During Check In, Adept will check the setting, Stop at AutoCAD Overlays, Stop at SOLIDWORKS In-context Relationships, and Stop at Inventor Substitute References, set by the administrator.

Document Names Checked for Uniqueness and Length

The document names of new documents must be short enough to fit into the Filename field. If the names are too long, the Gatekeeper dialog box appears.

The name of the document must be unique within a library. In addition, the administrator determines whether the name must be unique across the vault, or the whole site. Depending on the setting for Unique Filenames, Gatekeeper blocks check in of documents with duplicate names.

After the Gatekeeper validates the document names, the selected documents appear in the Check In dialog box.

Assign to

If you have assign rights or approve rights, you can select any user who has check in rights for Assign To, and the document appears in the person's Inbox. If you select <None>, and the document is being checked in to a checked library, the document appears in the Inbox of all Workflow Managers responsible for that library.

Note: If you are checking in a document to the step of a workflow, the users listed in the assign dropdown list will depend on the options in that step of the workflow. If the option, Only allow assignment to other Reviewers, is enabled you can only assign the document to reviewers in that step. If the option is not enabled, you can assign to any user with sufficient rights.

See the topic Assign To List for details of which users appear in this list.

Note: If you are checking in more than one document at a time, the assign dropdown list will only contain the names of people who are qualified to accept an assigned document, for all the documents you are checking in. If you do not see the name of the person you wish to assign the documents to, select fewer documents and try again.

Should the documents be checked into a Library enabled for Full Text Extraction and the document not be successfully extracted, you will receive a prompt indicating so along with the option to open the log file.

When you check in a document, a History record is generated, if the History Depth of the library is greater than zero.

If you are checking in a document for which Property or Attribute extraction is supported, and for which you have set up the appropriate Extraction field in the database, Adept automatically updates the database with the property or attribute value on check in. Similarly, any Xref or Part references in the document are updated at this time.

See also: Check In Dialog Box

13.2 Check In

You can check in documents by selecting one or more documents in the results area and selecting the Check In ribbon button. The dialog will display the documents you selected.

Options For Each Document

In this dialog, you can select one or more documents in the list and have the selected options apply to those selected documents. Different documents can have different options. **Library**

For New or Duplicate documents, click on the Library column to display a drop-down list from which to select the target library.

Assign

Click the Assign column to select from a list of users.

Undo Check Out (optional)

Optionally, there may be a column for "Undo Check Out." "Undo Check Out" releases check out, returning the document to In or Hold (depending on the type of library). Then the Duplicate document that remains in the work area is retained but now has an Adept status of Duplicate..

Note: Whether or not the Undo Check Out column appears will depend on the setting "Enable Undo Check Out" available to your administrator on the Admin page of the Adept Options.

Keep Out

By checking the option Keep Out, you can indicate documents you want to check in and keep out. "Check In and Keep Out" acts as if you performed the two operations; check in and then check out. The status of such documents after the operation is OUT.

Create Version

By checking the Create Version option, Adept is forced to create a new version of the document when it is checked in, thereby saving the older version. This option only applies to those Libraries where automatic saving of versions is not enabled but manual saving of versions is permitted.

13.3 Check Out/Copy Out

You can copy out or check out documents by selecting one or more documents in the results area and selecting the ribbon button for the desired command. The dialog will display the documents you selected.

Work Area

The default destination will be the Work Area you currently have active, but you may select a different one from the dropdown list. If you had no active Work Area, the cell will be empty and the OK button disabled until a Work Area is selected. Selecting OK completes the Check Out or Copy Out operation and the document is placed in your Work Area.

13.4 Information Source

When you check out a document, Adept creates a copy in your Work Area while the original remains safely in the library. Now that there are two copies, Adept must decide

whether to display information that is associated with the Work in Progress copy or the one in the library. For a complete description of how Adept decides which document to display see Which Source: Library or WIP.

Adept determines which copy to access based on several factors, depending on the specific situation. The setting called Information Source only affects the display of data in Adept columns and in the relationship tree of the Document Dashboard. You can set the value of "Information Source" either from the Information Source option in the View menu, or by clicking the words Information Source on Adept's status bar.

To let you easily see which copy you are displaying in the FileGuide, Search Results or Document Dashboard, Adept displays the information about the Work-in-Progress document in a different color font. You can select this Work-in-Progress color from the Edit menu, Options selection, under the General tab. The information in the Library is displayed in black. When there is a Work In Progress document, and your Information Source is pointing at your "IN" documents, the color that these "IN" documents are displayed in is generated by Adept to be significantly different from the Work in Progress color.

Adept Columns

As you make changes to your checked-out document, your Work In Progress may contain different information than the copy in the Library. To be sure you are viewing the correct data card information, you need to explicitly choose which copy you are viewing by selecting the Information Source. This option may be selected in the View menu or more conveniently as a clickable area in Adept's status bar.

Document Dashboard Tree

If you change the external relationships of the document, the information in the Document Dashboard's Where used display or in the Children tree will differ between the two copies. Changes in external relationships also could affect the display of Parent and Child relationship glyphs. Setting the Information Source determines which copy Adept draws its information from.

The choice also depends on the Library Access Right to allow users to view documents on Hold. For a complete explanation of how Adept chooses between the work-in-progress and the copy in the Library see the topic: "Which Source: Library or In Progress"

13.5 Gatekeeper: Verify Name

When you add documents into Adept, by copying them into your Work Area, Adept checks each document's name to be sure that it passes basic rules.

When Filenames Are Stopped by Gatekeeper

Documents are not checked in if the name fails either the length or uniqueness test. Documents that fail these tests are displayed in the Gatekeeper dialog box. The user may examine the list and must rename each document by editing the document name and clicking the Rename button. If you choose not to change the document name, the document is not added to any Adept Library.

Uniqueness of Name

The name of the document must always be unique within a Library. In addition, the Administrator can determine if document names must be unique within a Vault or across the whole database. This option is set by the Adept administrator. Depending on the setting, Gatekeeper blocks check in of documents with duplicate names.

Length of Name

The Administrator can set the length of the database document name width. The Gatekeeper ensures that the document names of new documents fits into the field. Adept does not allow you to enter names longer than the size of the Filename system field set up in your database by the Administrator. If your document names are rejected, consult your Administrator to decide if the document names should be shortened, or if your database field length should be increased.

Checking Names for Special Characters

Document names must follow all Windows document naming conventions. In addition, avoid using special characters. Even if they seem to be accepted, they can cause problems during other operations, or within other programs: Avoid composing document names with special characters such as:

\ / : * ? " < > | ; ! # \$ % & () @ + ^ =

Note: Be aware that Gatekeeper's only function is to check the document name itself. In some applications such as external references in CAD document names, other limits might be imposed. As a result of limits imposed by applications and the operating system, we suggest that you keep the filename plus path length at a maximum of 220 characters.

14 Acquire/Release Check Out

14.1 Acquire Check Out

A document in your work area has a status of Duplicate when Adept detects there is another document with the same name in a library. Some reasons you might have a document in your work area with a status of Duplicate:

- Copy a document from a library
- Check out a document that is In and release check out
- Check out a document on Hold and release check out

Typically Adept won't permit you to check in a Duplicate document. However, in some situations you may want to check one in. For example if you edited a Duplicate document, thinking it was checked out, and you don't want to lose your changes, you would want to check it in. To return a Duplicate document back to a library containing a document with the same name, use the Acquire Check Out command.

When you select a document in the work area with a status of Duplicate and select the command Acquire Check Out, located on the Document tab, Adept converts the status of the document you selected from Duplicate to Out. Now that the document is Out it behaves like any other Out document and can be checked in. (If the status doesn't change to Out, press the F5 key to refresh your window.)

If the exact document name is used in more than one library, you are presented with a list of libraries where this document name is duplicated. Select the library where this document will be returned when you check it in. You must use caution because Adept has no way to know which library is the right one, so you should be clear about selecting the right library.

In any given operation, Acquire Check Out can only operate on documents from one library at a time. When you select more than one document and then select Acquire Check Out, Adept checks to see if all the selected documents are all from the same library. If there are some from one library and some from another, you are prompted to select which ones you want to include in your Acquire Check Out command.

Note: If you checked out a document that was on HOLD and then Release Check Out, the document in your work area is Duplicate. If you then Acquire Check Out, the copy in your work area changes from Duplicate to Out. When you check this document in, it will overwrite the copy in the Holding Area.

Acquire Check Out is especially valuable immediately after a new installation of Adept. During installation, the documents stored in your network directories are Synchronized into Adept libraries. During the period while the documents are being synchronized, you may be continuing your work, editing copies of these documents on your local drive. When you start using Adept, the documents on your hard drive have a status of Duplicate because Adept detects they have the same name as a document already in a library. To check these in for the first time, you would first use the Acquire Check Out command to convert their status to Out. After the documents' status is Out, you can now check them in normally.

Batch Acquire Check Out

Adept also allows you to select multiple documents before issuing an Acquire Check Out. However, this Batch Acquire Check Out is limited to returning documents to a single library. When you issue this command, you will select the library where you want your documents to go. If Adept finds a document of the same name in that library, it will proceed. If not, it will issue an error message.

14.2 Release Check Out

When you Check Out a document to work on it, Adept locks the library copy of the document so that no one else can work on it. For Checked and Unchecked Libraries, a copy of the document is made to your work area. During the time you are working on the document, it has a status of Out.

To abandon your changes and allow the original library document to become accessible to another user, use the Release Check Out command.

To Release Check Out, first select the documents which you have checked out. Select the Release Check Out command on the Document tab to display the Release Documents dialog box with the list of the selected documents. You can accept or cancel the operation. When you accept the release operation, the status of the library document returns to IN and the status of the copy in your work area becomes Duplicate.

You can think of Release as an undo for checking out.

14.3 Undo Check Out of Unchanged Children

If you check out assemblies with large numbers of children, after you complete your work you might have a substantial number of unchanged children. To 1) release check out of those unchanged children, 2) delete the duplicates, and 3) restore the assembly's external references to point to the version before the child was checked out, use the command Undo Check Out of Unchanged Children.

Access this command from the work area. Select one or more parent documents with at least one child that is Out, and select the Undo Check Out of Unchanged Children command on the Document tab of the ribbon, or from the work area's right-click menu.

Note: If your admin has enabled Undo Check Out in Adept Options, you can Undo Check Out of individual documents by selecting the Undo Check Out option in the Check In dialog.

When applied to an assembly, "Undo Check Out of Unchanged Children" will perform the following sequence of operations:

1. Determine which children of the assembly have not been changed
2. Change their status from Out to In, or Out to Hold depending on the status before they were checked out.
3. Delete the copy of the Out document from the work area
 - a. If Adept detects that the data card metadata has changed, you will be notified before the Out document is discarded, giving you the opportunity to save the document's metadata.

4. Fix the external reference of the assembly to point to the version of the document pointed to before the document was checked out. (This would fix references to point to the IN version of a document checked out from the library, or the Hold version of a document checked out from Hold.)

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15 Rename & Delete Documents

15.1 Rename Documents

Documents that have a status of NEW or DUPLICATE may be renamed by anyone with any level of access rights. Other documents may be renamed by users with the appropriate rights.

If you rename a DUPLICATE document to have a name that is not used by any other document, the status changes to NEW. If you rename a NEW document to have a name that is already used in the Adept database, the status changes to DUPLICATE.

Adept does not allow you to enter names longer than the size of the Filename system field set up in your database by the Administrator. Document names must follow the Windows document naming conventions and cannot include any of the following nine characters:

\ / : * ? " < > |

Note: Although other special characters may be supported, it is highly recommended not to use them.

When you rename a document, Adept automatically changes the name in the document's associated database record and all versions.

Rename Documents: Updating links in Parent Documents

When you rename a child document, Adept must change the external reference between the parent document and its child. These changes will not actually be made in the parent document until a user checks out and opens the document. You may choose to force these pending changes by manually issuing the Batch Open and Save command or you can cause these changes to take place automatically for Inventor or SOLIDWORKS documents by setting the appropriate option in the Inventor or SOLIDWORKS Workstation PlugIn.

Rename Documents: Notes for SOLIDWORKS Users

Due to limitations in the SOLIDWORKS integration, be aware of the following requirement.

If you rename a SOLIDWORKS child in Adept and the parent of that child has a status of OUT, NEW or DUPLICATE, you must run the Adept SOLIDWORKS integration command Refresh References from Adept or Refresh All References from Adept.

Rename Documents: Notes for MicroStation Users

When renaming MicroStation documents in Adept, Adept will record the new name but the MicroStation parent will still reference the old name, in which case the parent will no longer be able to reference the child. You must manually fix the reference within the MicroStation document by opening the parent document in MicroStation and correctly pointing to the renamed child.

15.2 Delete Documents

As with most Adept operations, Delete operates on all the documents that are selected. The Delete command performs differently depending on the document's status.

You can delete a document that is NEW or DUPLICATE in your work area. The file will be deleted from disk.

Rename & Delete Documents

If you desire to delete a document that is OUT to you, you must first use the Release Check Out command followed by the Delete command.

To delete a document that is on HOLD, you must have Workflow Manager rights. The delete command deletes the record for the document in the Holding Area but does not delete the file from the Adept system . The copy that is in the Library becomes IN again.

To delete documents with an IN status, you must have Library Access Rights to Manage Documents in that library. Deleting a document that is IN removes all associated metadata, history records and versions, and deletes the file from disk (see note below).

Caution: There is no undo for deleting documents. Once the documents have been deleted, they can only be restored from your network backups.

16 Link/Unlink Records

16.1 Linked Record

To manage documents, the records in Adept's database are linked to a document on a hard drive. Adept's database stores information about who owns it, its size and date, and other data about the document. If you want to retrieve or view the document, the Link tells Adept where to find it.

When you delete a Linked Record, the document's file is deleted from the Adept Library as well.

You can change an Unlinked Record into a Linked Record by linking the record to a document. You can change a Linked Record to an Unlinked Record by Unlinking from Document. These commands are only available in the Adept Desktop Client.

16.2 Unlinked Record

In some situations you may want to track a record that is not linked to a computer file. For example you can use an unlinked record to track a paper document in a physical desk drawer. You may simply create a new Unlinked Record.

Unlinked Records are listed in Adept windows in an italic font.

You can change an Unlinked Record into a Linked Record by linking the record to a document. You can change a Linked Record to an Unlinked Record by Unlinking from Document. These commands are only available in the Adept Desktop Client.

Versions

17 Versions

17.1 Versions

Adept can save previous copies of a library documents. These previous versions are recorded in the Adept Versions database and stored in the numbered Version sub-folders for that Library. Adept never changes the name of the actual document. The mechanism Adept uses "under the hood" is to move versions to sub-folders. When Adept creates the Version, it increments the "Adept Version number" of the copy in the Library.

Note: When you check a document back to a library, the Version number is always increased, even if you are not saving a new version.

To see previous versions of the document you currently have selected, display it in the Document Dashboard, and select the Versions tab.

Synergis Adept Web Client

In addition to the Major version level that is kept in the Version Table, Adept also tracks a Minor version. Major versions are created when you check a document out from being IN the Library. Minor versions are created when you check a document out from being on HOLD. So for example, a document that is checked out from Hold might be Adept Version level 3.2. The number 3, before the dot, is the major version number. The number "2" after the dot is the minor version number. When the document is approved so that it returns to the Library, the minor version "collapses." The Adept Version level now has a zero minor version.

To see all the minor versions of the document you currently have selected, display the Document Dashboard, and select the WIP tab.

Here is an example of the Adept version numbering for a document that is IN the Library. If the document is IN the Library on version 2, when you check it out, it would become version 3.1. Notice that both the major and minor version are incremented. When the document is checked in, and goes on Hold, the number stays 3.1. When it is checked out from Hold, the minor number is incremented so now the Adept Version number would be 3.2. When this is checked in to Hold, it stays at 3.2. Now suppose it is approved through several steps in the Workflow. When it is approved at the last step, and returns to the Library, the IN copy now "collapses" to version 3.0. Notice the minor level in the Library is 0.

If there are more versions being saved than are allowed by the Major Version depth that has been set for this Library in the Library Profile, the oldest Version is deleted to make room for the most recent one. The current Data Card is also copied and kept with the Version, keeping a "snapshot" of the document and its Data Card information.

17.2 Create Versions

Adept manages versions as well as documents. When a version is created, the current data card is also copied and kept with the version, keeping a "snapshot" of the document and its Data Card information. Once the version has been created, it cannot be checked out or checked in. It can, however, be viewed, or copied.

Adept can create versions in one of three ways.

Versions

1. If the library to which you are returning a document is set to "Always Save Versions" in the Library Profile, Adept always saves a version for every document you return. Adept does not offer a choice.
2. If the administrator has not set up the library with the option "Always Save Versions", when you return the document to the library you can optionally create a version. For a checked library, the Create Version option is in the Approve dialog box, available when the workflow manager approves a document. For an unchecked or open library, the Create Version option is in the Check In dialog box. You can include or exclude individual documents from the list to be Revised by checking or unchecking the box to the left of each document.

Synergis Adept Web Client

3. You can select a document in a library, and then select Create in the Version panel of the Workflow tab. When you use the Create Version command, the Version dialog box gives you a check box that creates a Version for all children documents of this document, if any exist (including children of children, etc.)

Note: To create a version, you must have the library access right to return a document to a library. In a checked library, you need Workflow Manager rights, and in an unchecked or open library you need check in rights.

Note: The document(s) you select for this operation must have been in the library at least once. You cannot create versions for a document that has just been created and has never been in a library.

Numbering/Naming of Versions

Versions are stored without renaming any documents. Instead of changing the document name, Adept saves them in numbered version sub-directories for that library. Each library has its own area for versions. As the document is copied, its number in Adept's version level system field is incremented.

When you create a version, Adept automatically increases the system field named "Adept Version #." For a new document, this number starts from 0 and is incremented by one for each version saved. In addition to this System Version number field, your administrator may choose to create a custom field that corresponds with your own version numbering or lettering system.

Avoid duplicating versions

Because versions bump older versions out of the Version database, if there was no change to the document you should avoid creating unwanted versions. If you check out a document simply to check or print it, you can avoid checking it back into the library by using Release Check Out and then deleting the copy of the document in the work area.

Tracking Relationships with Versions

When Adept saves a version, it continues to track relationships among documents. If the document to be revised is the child of another document, Adept manages this link either by redirecting the parent to link to the version, or allowing the link to float up to the most recent version. These options are set by default in the appropriate menu, or individually from the Document Dashboard.

Libraries

18 Libraries

18.1 Library Introduction

Libraries are the central storage area for documents in Adept. Each library corresponds to a folder on your network server. Administrators may give each library a descriptive name.

This does not need to be the same as the name of the folder. An Adept Vault is a series of Adept Libraries.

Using Libraries

Libraries can be defined as Checked or Unchecked. Each checked library can have a Workflow. When the document enters the Workflow, Reviewers at every stage review the document and either approve or reject them. When they go through all the steps of the Workflow, Adept returns them to the original library. an Unchecked Library has no Workflow and documents are returned directly to the Library without review.

To work on documents, you check them out of their library, edit the copy and then check it back in. Both Checked and Unchecked libraries use the SafeEdit feature, meaning that when documents are checked out of the Library, Adept creates a working copy of the document in a Work Area. The original copy remains in the Adept Library and has a status of OUT and is locked so that other users cannot edit it.

To understand the types of libraries, see Open, Checked and Unchecked Libraries.

18.2 Checked Library

The Administrator designates every library to be either Checked, Unchecked or Open. A Checked library provides the highest level of security.

Checked libraries use the SafeEdit feature. With SafeEdit, when a user checks out a document, Adept creates a copy of the document that is to be worked on and locks the original copy in the Adept Library. After the user is finished with the document, Adept moves the document to a WIP Area with a status of HOLD where it waits for the reviewer's approval. The only users who may approve or reject documents on HOLD are those users who are in a group that is assigned to the current step of the Workflow.

When the reviewer approves the document, it is moved to the next step in the Workflow. If this is the final step, approve returns it to its library and the original copy is kept by moving it into a separate location for document versions.

18.3 Unchecked Library

An Unchecked library is the intermediate level of Adept security. In an Unchecked library, no reviewer approval is needed when the user checks in a document. Unchecked libraries use the SafeEdit feature meaning before a user can edit a document, the user must check the document out of the library. This creates a copy of the document that is to be worked on, and locks the original copy in the Adept Library. After the user is finished with the document, Adept returns it to its library and the original copy is kept by moving it into a separate location for document versions.

Libraries

18.4 Open Library

In an Open library the user is permitted to edit documents directly as they reside in the library. The documents need not be checked out. The library is called Open because you can open an application on the document while it is still in the library.

Since the user is working directly on the document in the library, this type of library does not use Adept's SafeEdit feature. Open libraries are useful for documents that don't require the additional security of the SafeEdit feature and when you need the added convenience of directly editing the document without checking it out and then back in.

For more security, implement Adept's SafeEdit feature by setting the library to Checked or Unchecked.

Note: You cannot open a document that is located in an FTP Vault or an AFS Vault.

19 Workflow

19.1 Workflow Introduction

An Adept Workflow is a sequence of workflow steps for a document. When you check a document in to a Checked Library, it goes into the first step of a workflow. At each step, one of a group of Reviewers may:

- Approve the document – moving it to the next step,
- Reject the document – moving it to a previous step, or
- Assign the document to another user

A document takes its workflow from one of four possible settings.

- When you check in a document, Adept checks to see if the document itself has been assigned a workflow. (This would be done by using the Set Document Workflow command.)
- If there is no Document Workflow, Adept checks to see if the library has been assigned a workflow. (This would be done in the Library Profile, or with the Set Library Workflow command in the Library Administration tool.)
- If there is no Library Workflow, Adept automatically assigns the System Default Workflow.
- Finally, during the workflow, at a step that permits rerouting, the workflow may be temporarily changed by the Reroute Workflow command.

The person who first checked the document into this workflow is the Originator.

Workflow Actions

All the people in the groups assigned to a step are responsible for reviewing the document. These are the Reviewers at that step. Any one of them can approve or reject the document. If multiple approvals are required at a particular step, then all such approvals must be issued to move the document to the next step.

- Approve – The Reviewer at each workflow step can approve a document, sending it on to the next step in the workflow. It is possible that one step could require more than one approval in order to advance.
- Reject – The Reviewer at each workflow step can reject a document, sending it back to the previous step in the workflow. If it is at the first step, reject is disabled.
- Assign – Use the Assign command to send work to another Adept user. The document name will appear in the assignee's Inbox and optionally an Email is sent advising him or her of the assignment.
- Comment – When you approve a document, you are given the opportunity to enter a comment. This comment will be useful to get an overview of the action or response offered at each step.
- Check Out from HOLD – When you check out a document from HOLD, (or Assign/Hold) Adept creates a minor version. This version is numbered with a decimal point (eg: after you check out 3.3, Adept creates 3.4).
- Return to the Library – At the last step in the workflow, the approve command returns the document to the library. Any Reviewer in the last step of the workflow has the right

to approve and return the document to the library. If "Notify Originator" is enabled, the Originator of this workflow is notified by email.

Note: Since documents have a status of Hold while they are in a workflow, the Workflow Administrator needs to grant Reviewers the "View/Resolve to WIP" right for this library, so they can see the documents in their workflow.

Note: If Reviewers have not been assigned at least View rights to the documents that they must review they will see <access denied> in their Inbox.

Workflow Administration Settings

The Workflow Administrator creates, edits, and deletes workflows. The Workflow Administrator is the workflow owner and is a user who has been granted a special right, and can perform this function across the entire Adept installation.

Note: The Workflow Administrator can only create, edit and delete workflows in the Adept Desktop Client using the Administer Workflow command in the Manage panel on the Admin tab of the ribbon bar.

- Notifications - When a document is in a workflow, any action that moves it to a new step may trigger automatic notification to Reviewers in that step and the Reviewer will see the document in their Inbox. When the document has been approved on its last step and returned to the library, the Originator may optionally be notified.
- Additional Reviewer Rights - At each step on the workflow, the Workflow Administrator may grant additional advanced options. These additional options include the right of any Reviewer to reject back to more than one step. Also available are special rights for Workflow Managers. These rights may grant a Workflow Manager the ability to jump forward or back any number of steps (called "Expediting"), and to branch out and move the document to a different workflow.

Groups

There are two kinds of groups assigned to each step. One type of group is already familiar to Adept Administrators. These groups, called Library Access Groups, are assigned to libraries, and are created by the Administrator in the Users, Groups, Libraries Dialog. Another type of group, used for Workflow are called meta-groups. These groups are defined by some simple rule, and then the members of the meta-group are added at the last minute, based on which users conform to the rules of the meta-group.

There are six meta-groups that can be assigned to a Workflow step:

- All the Viewers in this library,
- all the Editors in the library,
- all the Workflow Managers in this library,
- all the Document Managers in this library,
- the Originator – first person to check the document into this workflow, and
- All the reviewers in this step of the workflow.

When one of these meta-groups is assigned to the workflow step, any user who belongs to the meta-group is a Reviewer in that step.

Default System Workflow

Adept has always had a simple, one-step approval process. Under this traditional one-step workflow, any document checked in to a checked library goes to a holding area. From there, it can be reviewed by any Workflow Manager in that library. The group of reviewers for this workflow is the meta-group of all Workflow Managers for the library.

Status – where in the Workflow is the document?

As the document moves along the workflow, Adept records its movement. You can review the Workflow History of the document in the Workflow tab of the Document Dashboard. Select the document in any Adept window. Then click on the document. If you don't have automatic Document Dashboard update on, update it manually, and then select the Workflow tab in the Document Dashboard. This will display the list of steps taken so far, along with comments for each step.

Note: In the Document Dashboard's Workflow Tab, you can see a list of Reviewers for each step, by right-clicking on that step.

19.2 Unassign Documents

If you no longer need to have a document assigned to you, select the document and select the Unassign command. This cancels the assignment and the Owner field is cleared.

When you unassign a document which is awaiting review by you, the document's status changes to Review. When you unassign a document which is awaiting review by someone else, the document's status changes to Hold. If you unassign a document in a library, its status changes to IN.

Any user can unassign a document that was assigned to them. The document can also be unassigned by the last owner (the person who did the assigning.) Only users with workflow manager library access rights or administrators can unassign documents that were assigned to other users.

19.3 Assign Documents

When documents are assigned, their Adept status is set to Assign, AssignHold or AssignReview. The Owner field is given the value of the person to whom the document is assigned and the Last Owner field is set to the person who did the assign. The assigned documents appear in the Inbox of the person to whom they are assigned.

Assign documents by first selecting them in a window and select the Assign command. The Assign dialog box is displayed. Select a user from the drop-down box.

Assigning a document whose status is In

If the document has a status of IN, to assign the document you must have rights to Assign or Check In for that library. You can assign the document to any user who has view rights for that library. After you assign it, the document's status becomes Assign.

Assigning a document whose status is Hold or Review

If the document has a status of Hold or Review, to assign the document you must have Assign rights AND be the last owner (that is, the person who last checked in or approved or rejected the document), OR you must be a workflow manager or an administrator.

You can assign the document to users with View/Resolve to WIP rights. The target list of people you can assign to is further conditioned by the option in the document's current workflow step. If the option is enabled to "Only allow assignment to other Reviewers" then the assign dialog will list other reviewers in the current step with View/Resolve to WIP rights to the library. If the option is not enabled you can assign to anyone who has View/Resolve to WIP rights.

After you assign it, the document's status becomes either AssignHold or AssignReview. The person who did the assigning is the last owner and the person to whom it was assigned becomes the owner.

A document on AssignHold or AssignReview can only be unassigned by the owner, last owner, workflow manager and above, or administrator and can only be checked out by the owner, and only if check out is permitted at that step in the workflow

Note: You can assign documents to users who only have Viewer and Assign rights. They will be able to view the document, and then unassign it when they are finished.

19.4 Assign to: List

During several operations in Adept you can conveniently assign a document to another user by simply selecting the user's name from a dropdown list of eligible users.

This list appears in dialogs for:

- Assign
- Check In
- Approve
- Reject
- Expedite Approve ·
- Expedite Reject

This help topic explains how the Assign To list is calculated. The users who appear in this list are determined according to the following rules.

- 1) If the document is IN, the list contains all users who have the right to view a document in that library.
- 2) If you are checking a document into a workflow, or are approving, rejecting, or assigning a document that is in a workflow, the Assign To list is determined by the rules governing the workflow.

Only allow assignment to other reviewers

When a document is affected by workflow rules the most important consideration is the option called "Only allow assignment to other reviewers." When this option is enabled, the Assign To list will only contain reviewers at this step who also have View/Resolve to

WIP rights for the library. When this option is disabled, the Assign To list will contain anyone with View/Resolve to WIP rights in the library.

Which step of the workflow does this apply to?

Because of the AutoAdvance feature in workflow, if you are checking in, approving, or expedite approving a document, it may not be obvious which step this document is being moved to. To understand how the Assign To list is calculated, you must understand which step the document is moving to.

Effect of AutoAdvance on Check In, Approve, and Expedite Approve

If you are checking a new document into workflow, Adept will check the options in the first workflow step. If the first step has enabled the AutoAdvance feature, then the document will automatically pass through to the next step. If that step also is AutoAdvance then it will continue to pass until it reaches a step that is not AutoAdvance. Similarly if you are approving the document to an AutoAdvance step then the document will automatically move until it reaches a step that is not AutoAdvance.

If you are approving a document on a workflow step that requires multiple reviewers

If the workflow step requires multiple approvals Adept will check to see if this approval will move the document to the next step. This will determine the users in the Assign To list. If further approvals will be needed in order to move the document to the next step, the Assign To list will contain the reviewers in the current step. If this approve completes the number of approvals required for the current step, then the Assign To list contains the names of reviewers in the next step that is not AutoAdvance.

Effect of AutoAdvance on Reject, Expedite Reject, and Assign

During reject or expedite reject, the AutoAdvance option has no effect. Similarly, the assign command does not advance the Workflow step, so the Assign To list is determined by the step you are in. AutoAdvance has no effect.

Metagroups are converted to user names

The reviewer list in a workflow step can contain metagroups, indicated by angle brackets. The metagroup <originator> is the person who first checked the document into this workflow. In the Assign To list the <originator> is converted into the user's name. Other metagroups are: All the Viewers, Editors, Workflow Managers or Document Managers in the library. In the Assign To list box the members of these groups are listed with the actual user names.

Another way to see the list of reviewers

You can list the reviewers at any step in the workflow by looking in the Workflow tab of the Document Dashboard. In the Document Dashboard, right-click on the document at the step you want to learn about and select "Show Reviewers for this step." This displays a list of the reviewers.

19.5 Approve

When a document is checked in to a checked library, the document is moved to the holding area and is automatically in a workflow, which means it is on a workflow step,

available for review. The document will automatically appear in the Inbox of the reviewers.

Who may issue an Approve

You can issue the Approve command if you have been designated as a reviewer at the step in the workflow where the document resides. If the document is in a System Default Workflow, the reviewers consist of workflow managers in that library.

All reviewers must have at least the right to view the document. In addition, they must have other Library Access Rights that control whether they can check out the document, open an application on the document in the Holding Area, or assign the document to another user for further work.

Multiple Approvals

If the step requires more than one approval, then the document stays on this step of the workflow until all required approvals have been received. When the document receives sufficient approvals, it is moved to the next step. If it is at the last step of the workflow, approval moves it back into the library. If you approve the document and the document stays in the current step, it will be removed from your Inbox. You are no longer considered a reviewer for this document and can no longer issue an approve.

Add a Comment

When you approve a document, you are given the option to add a comment. This comment can then be viewed in the Document Dashboard's Workflow tab as well as in the Audit Trail to give an overview of the progress of the document at each step.

Assign While Approving

When you approve a document, the approve dialog gives you the opportunity to assign the document. The Assign list includes all Adept Administrators and then varies depending on the configuration of the workflow step.

If the workflow step option "Only allow Assignment to other reviewers" is checked, the names that appear on the Assign list are the reviewers of the step to where the document is being approved who also have View/Resolve to WIP rights to the library. If the workflow step option "Only allow Assignment to other reviewers" is not checked, the names that appear in the Assign list will include the reviewers with View/Resolve to WIP rights to the library and any user that has View/Resolve to WIP rights to the library.

For final approve, there is no option for assigning, so the Assign To list will not be displayed if all the documents in the dialog are on the final step.

To facilitate the setting of an Assign To, you can select any documents in the Approve list, by using Windows selection methods of shift-click and control-click. When you select an Assign To, all the highlighted documents will be affected.

Approving a Document on a Workflow step that requires Multiple Reviewers

If the workflow step requires multiple approvals, Adept will check to see if this approval will move the document to the next step. This will determine the users in the Assign To list. If further approvals will be needed in order to move the document to the next step, the Assign To list will contain the reviewers in the current step. If this approve completes

the number of approvals required for the current step, then the Assign list contains the names of reviewers in the next step.

Return to the Library

When a reviewer approves the document at the last step in the workflow, the document returns to the library with a status of IN.

Note: Anyone who is a reviewer in the final step of a workflow has the right to approve the document and return it to the library.

When the document is moved from the last step of the workflow back into the library, the previous copy in the library is either overwritten or saved as a version. The version level of the document "collapses" down to the ".0" version. If you have selected the option to remove all intermediate minor version levels, they are deleted at this time.

The decision to create a version can be done in three ways.

- In the Approve dialog box, the workflow manager can select an option to create a version.
- If the Administrator has set this library to always create a version, then a version is created automatically whenever a document is returned to the library.
- The workflow manager can manually create a version by selecting Create Version command.

Workflow Managers may choose to abandon all changes and delete the edited copy of the document from HOLD. After executing Delete from WIP the edited document is deleted and the copy of the document that is in the library changes to a status of IN.

19.6 Expedite Approve

When the workflow step has the option enabled to "Allow Expedite Approve at this step by Workflow Manager" and if you have at least Workflow Manager rights for the selected document, then you can issue the Expedite Approve command. This command allows you to move the document any number of steps forward in the workflow including approving it at the last step and returning it to the library.

The dialog box may offer an option to create a version. This option is only applicable to certain libraries and only when expediting to Final Approval.

Multiple documents

You can select multiple documents and Expedite Approve them to a step in a workflow ONLY if all the selected documents are in the same workflow and the same library. If they are not, then your step options will be limited to the <Final Approve> step as that is the only workflow step that is common to all selected documents.

Note: Expediting can only occur to steps outside the range of steps that ALL the selected documents are currently on. For example, if 3 documents from the same workflow are selected and they are on steps 3, 5, and 7 respectively, they can only be Expedite Approved to steps greater than 7.

19.7 Final Approve

The selected document(s) move to the end of their workflow and are returned to the library.

While Admins can do this for any document, workflow managers are allowed to do this for a document for which they are a reviewer and only at steps of the workflow that permit Expedite Approve.

19.8 Reject

A Reject can be issued by a reviewer when they have selected a document that is in a workflow. Reject returns the document to the previous step in the workflow.

There is a checkbox next to each document in the Reject dialog. When you unselect the checkbox, the document on that row will be excluded from the reject action. However, if the Force Children with Parent option has been set by the Administrator, users cannot uncheck children.

When you reject a document, you may also select a person to assign it to. The list of possible assignees presented in the Reject dialog corresponds with the reviewers at the step to which you are rejecting the document.

To facilitate the setting of an Assign To, you can select any documents in the reject list by using Windows selection methods of shift-click and control-click. When you select an Assign To, all the highlighted documents will be affected.

When the document is on the first step of a workflow, reject has no meaning and is therefore disabled.

19.9 Expedite Reject

When the workflow step has the option enabled to "Allow Expedite Reject at this step by Workflow Manager," and if you have at least Workflow Manager rights for the selected document, you can issue the Expedite Reject command. This command allows you to move the document any number of steps backward in the workflow including rejecting it to the first step.

Multiple documents

You can select multiple documents and Expedite Reject them to a step in a workflow ONLY if all the selected documents are in the same workflow and the same library. If they are not, the action will fail.

Expediting can only occur to steps outside the range of steps that ALL the selected documents are currently on. For example, if 3 documents from the same workflow are selected and they are on steps 3, 5, and 7 respectively, they can only be expedite rejected to steps less than 3.

19.10 Reject To

A Reject To command can be issued by a reviewer in a workflow to send a document back more than one step in the workflow. Any reviewer can issue this command.

At each step of the workflow, the workflow administrator can enable Expedite Reject or Reject To. These commands differ in the fact that Expedite Reject allows you to return the document to any backward step of the workflow, whereas Reject To can be restricted to a particular backward range of steps.

Multiple documents

You can select multiple documents and reject them to a step in a workflow ONLY if all the selected documents are in the same workflow and the same library. If they are not, the action will fail with an appropriate message.

You can only reject more than one document to a particular step when that step is outside the range of steps that ALL the selected documents are currently on. For example, if 3 documents from the same workflow are selected and they are on steps 3, 5, and 7 respectively, they can only be expedited to steps < 3 or > 7 .

19.11 Reset to Start of Workflow

An Adept Admin can select a group of documents on Hold/Review and issue a Reset to Start. The selected documents move to the beginning of their workflow and remain on Hold/Review.

Admins can reset any document to the start of its workflow. In some cases, workflow managers are also authorized to reject a document to earlier steps, using the Expedite Reject command. This command is available to a workflow manager who is a reviewer and only at steps of the workflow that permit Expedite Reject.

19.12 Set Document Workflow

Workflow Managers, Library Administrators or Adept Administrators can select document(s) and use the "Set Document Workflow" command. This changes the workflow for the selected document.

This workflow will be applied when the document is checked out of a checked library and then checked back in. The document workflow takes precedence over the workflow for the library.

The document workflow is the default workflow that will be applied to the document when it is checked in. However this does NOT change the workflow of a document already in a workflow. If the document is already in a workflow, a second dialog asks if you also want to change the active workflow, in effect causing a Reroute.

Note: You cannot use Set Document Workflow for a New or Duplicate document because the document has not yet been entered into the library.

For example, the Projects library has the workflow "Engineer Approval." The document "Acme.doc" is in this library. You can select the document "Acme.doc" in this library and

assign the document workflow "MRP Administration". Then this document will be governed by the MRP Administration workflow.

Note: This command permits multiple selection – select 100 documents and set them all.

Note: The current document workflow can be viewed by adding the column "Document Workflow" to the window's columns

19.13 Reroute Workflow

When a document is in a workflow step that permits rerouting, reviewers at that step who are Workflow Managers and above can change the active workflow using the Reroute command. After this command, the document will enter the specified workflow at the first step.

The Reroute dialog also gives the option to make the new workflow permanent. When this option is selected, the new workflow becomes the default document workflow and will continue to be used in the future. If the option is not selected, this rerouted workflow is transient and after the document is returned to the library, this workflow will no longer be the document workflow for this document.

20 Email Notification & Send To

20.1 Email Notification Introduction

Adept can automatically send email notifications triggered by events defined by the administrator. The emails can include some metadata about the documents in the body of the email, in the email subject line, and in the predefined header and footer. If only one document is associated with the generated email, that document name is listed in the Subject line of the email.

Email Notification Scenarios

- When you assign a document to a user, the person you assign the document to sees the document in his or her Inbox and Adept sends an Email.
- When a document moves to a step in a workflow, reviewers and specified users may receive email notification. To see how to set this option in the workflow step, see Edit Workflow Step.
- Workflow Alerts can send email notification when a document has stayed too long at a particular workflow step.
- When a document is approved at the last step in a workflow, you can enable the workflow option to "Send Email to Originator," the person who first checked the document into the workflow.

In addition to these automated triggers for notification, you can manually send emails with optional attachments by using the Send To command.

If the administrator at your site has filled in a URL in the Email Notification tab in Adept's Option dialog, the notification email will also contain a URL that the recipient can use to open an Adept Web Browser Client. The URL includes links so the documents will appear in the recipient's Search Results window.

Email Notification Settings

Setting up email notifications must be done by an administrator in the Adept Desktop Client under the Email Notification section of Options. In order for users to receive email notifications, the user's email address must be listed in the "to" address of their User Profile.

- "Send Email When Assigned" will enable email notification when you are assigned a document. When you assign a document to yourself, no email will be sent.
- "Allow Email to Workflow Reviewer" will enable email notification in the workflow step.
- "Allow Email Alerts" will enable notifications to the Originator when documents are approved in the Default System Workflow. This notification cannot be turned off.
- To include a URL in the email notification for users of the Adept Web Browser Client, the administrator must fill in the URL root field. The notification email will then contain a

URL so the linked documents will appear in the recipient's Search Results window of the Adept Web Browser Client.

20.2 Send To

You can send documents or links to documents by selecting the documents in Adept and then selecting the Send To command. This command creates a list of the documents you selected and attaches that list to an Email, saves the list to a file, or sends the documents themselves by attaching them to the Email or by saving the documents to a ZIP file.

When you select documents in any Adept window and then select Send To, a wizard is presented allowing you to select the options related to this command. Your first selection is whether to send a link or to send the documents. Based on this initial selection, subsequent dialog will be different.

Sending a Link

Selecting to send a link then prompts for the link name with the option to exclude documents that reside in Adept Libraries where the filtering option is enabled. Once this information is provided, the next dialog prompts for recipients (Email addresses), the subject line for the Email, and any additional textual information you want in the Email body. Once one or more Email addresses are entered, the Send button becomes available. Selecting the Send button completes the command, sending the Email.

Sending a Document

Selecting to send a document then prompts for selection of options to include the children of the selected document, exclude documents that reside in Adept Libraries where the filtering option is enabled, and whether to place the document into a ZIP file before attaching it to the Email or to save the ZIP file to a folder. Once this information is provided, the next dialog prompts for recipients (Email addresses), the subject line for the Email, and any additional textual information you want in the Email body. Once one or more Email addresses are entered, the Send button becomes available. Selecting the Send button completes the command, sending the Email.

Note: .als lists are stored in the Adept database for a period of time determined by a setting made by the Adept administrator in the Email Notification tab of Options. If these lists are not saved indefinitely, the .als file will eventually become invalid and will no longer work.

Note: The ZIP file cannot contain duplicate filenames. When compressing documents into a ZIP file, should the selected documents contain one or more duplicate documents, you will be informed by a dialog box message and the ZIP file will not be created..

Send To for Out, New or Duplicate Documents is not Accessible

The Send To command is not available for documents in a Work Area. When performing a multiple selection of documents with various Adept status, the Send To command will remove documents with status of Out, New, or Duplicate and will provide notification that these documents will not be included in the Send To.

Documents: Include Children

When you check the option Include Children, Adept will recursively include all levels of children of the selected documents. However, included children are influenced by the Stop At settings in the Options dialog.

Note: AutoCAD internal files such as shape and font files are not automatically included.

Documents: Exclude documents in filtered libraries

If this option is selected, the Include Children command will not return any children that are located in libraries which have the library profile option enabled to Allow Filtering of Children.

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