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## Adept 2011 Web Client Overview

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## **Adept Web Overview**

Adept Web Client is a thin, web-based client designed for those users who need to review or consume documents and information stored in Adept. It complements Adept's full-featured Desktop client, offering a simplified interface and allowing users to find, view, print, redline, assign and copy documents based on their permissions in Adept. Adept Explorer and Adept Reviewer provide the same powerful viewing capabilities found in the Desktop client for AutoCAD, Inventor, SolidWorks, Word, Excel, PDF, TIF, and hundreds of other formats. It also displays revision information, file relationships, workflow status, and the audit trail of a document throughout its lifecycle.

## **Who Needs Adept Explorer?**

Adept Explorer is designed for anyone who needs to view or copy documents stored in Adept. Groups of users who may benefit from Adept Explorer include: manufacturing, procurement, maintenance, customer service, sales, marketing, quality assurance, project management, accounting, executives, contractors, customers and vendors.

## **Who Needs Adept Reviewer?**

Users who need to approve or reject documents in Workflow, or edit Library Cards, will be designated as Adept Reviewers in their User Profile. When those users run the Adept Web Client, it will automatically enter the Adept Reviewer mode. The Adept Reviewer looks and behaves the same as the Adept Explorer, with the exception of these additional capabilities. Adept Reviewer users will consume an Adept Reviewer license.

## **Adept Explorer Capabilities**

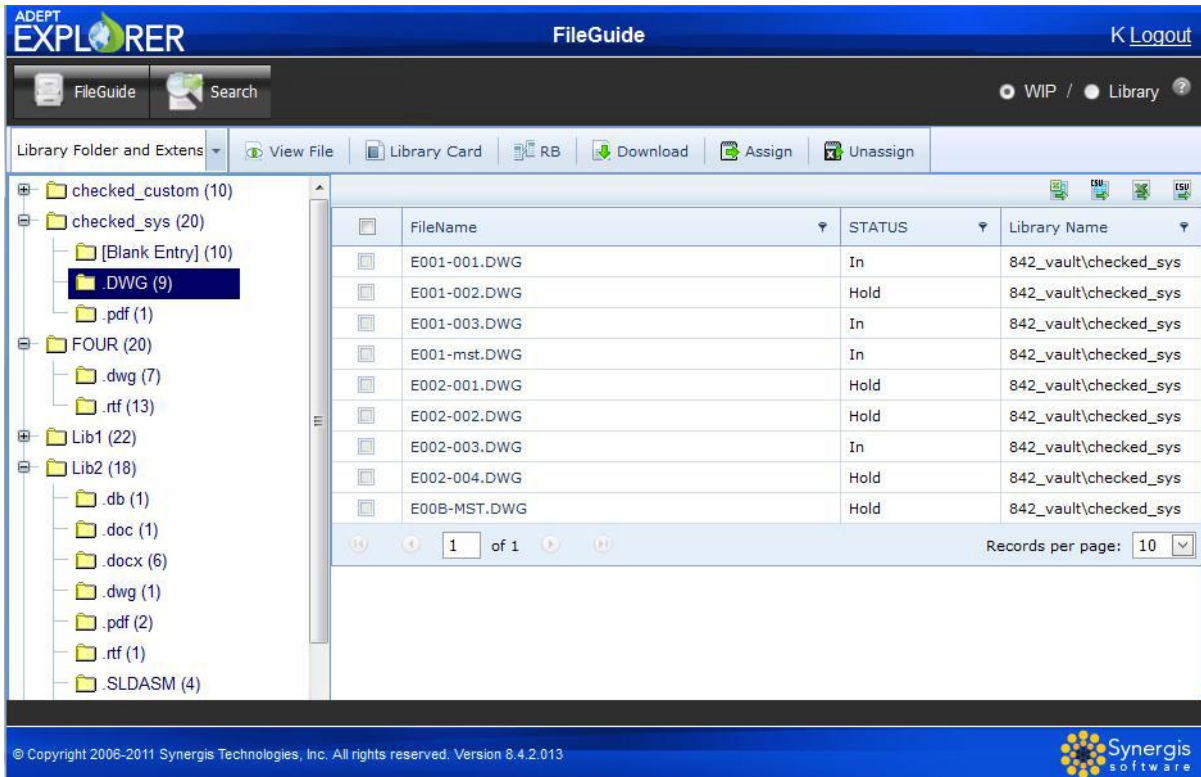
**Browser-based document access** – Adept Explorer runs from within your Internet Explorer or Firefox browser, making it easy to navigate and learn. When you install Explorer, there is no need to install or update the client software.

**Find files fast** – Adept Explorer ensures that users across the enterprise have fast access to the documents and information they need. Using the Search Card, you can perform simple or complex searches. For example, you can search on one, several or all fields.

The screenshot displays the Adept Explorer Search Card interface. At the top, there is a blue header with the 'ADEPT EXPLORER' logo on the left, 'Search Card' in the center, and 'K Logout' on the right. Below the header, there are two buttons: 'FileGuide' and 'Search'. To the right of these buttons, there are radio buttons for 'WIP' and 'Library'. Below this is a search bar with a dropdown menu set to 'Mechanical Data View', and buttons for 'Search', 'Clear', and 'Search All Fields'. The main content area has several tabs: 'Document Info', 'Change Notice Info', 'Product Info', 'Transmittals', and 'Memo'. The 'Document Info' tab is selected, showing a form with various fields: 'Filename', 'Library', 'Owner', 'Last Owner', 'Status', 'Product Series', 'Product Name', 'Drawing Title Block', 'Drawing Title', 'Part No', 'Revision', 'Date Drawn', 'Drawn By', 'Job No', and 'Scale'. The footer contains the copyright notice '© Copyright 2006-2011 Synergis Technologies, Inc. All rights reserved. Version 8.4.2.013' and the Synergis Software logo.

*A sample of an Adept Web Client Search Card*

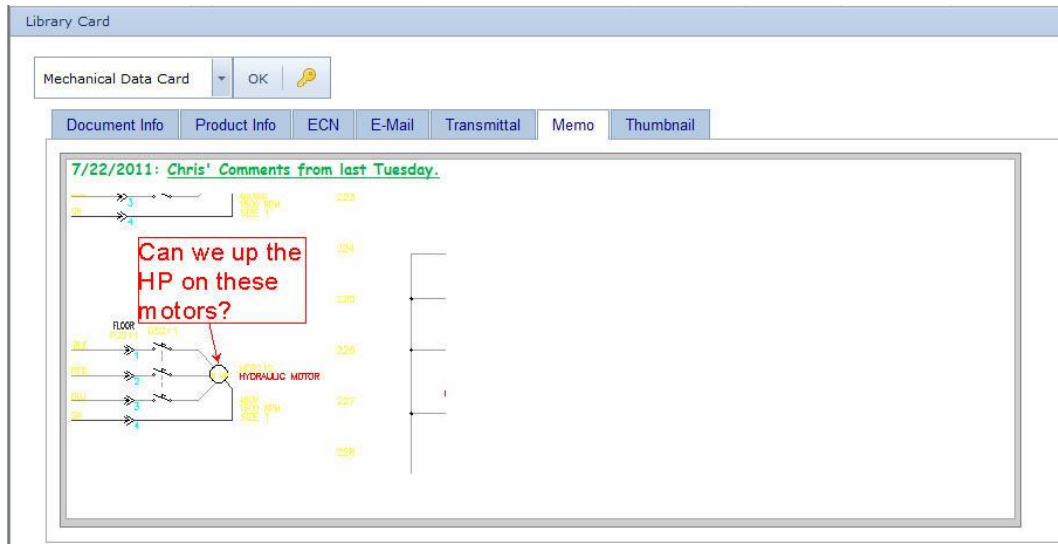
Using the FileGuide, you can browse through your documents based on any combination of fields in the Adept database.



*Adept Web Client's FileGuide*

To view all the fields in the Search card, you can select the Library Card button. In Adept Explorer, this metadata is visible as read-only information. In Adept Reviewer, you can edit the data.

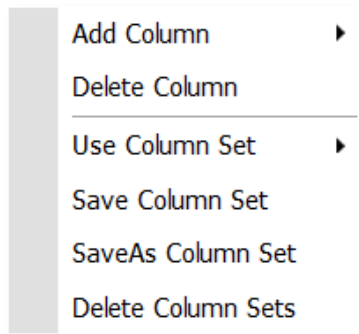
**The Memo Tab supports Rich Text Format and images** - Across the top of the Library Card are tabs that display various sets of information. The memo tab displays the memo field for that file. The memo tab can contain formatted text and images as shown below.



The Memo tab displays rich text formatting and images.

**Add and manage column sets from the right-click menu**

You can add or delete columns in Adept Explorer by right-clicking any column header and selecting from the right-click menu. You can also save your column sets. To change the order of columns, you simply drag and drop the column header.



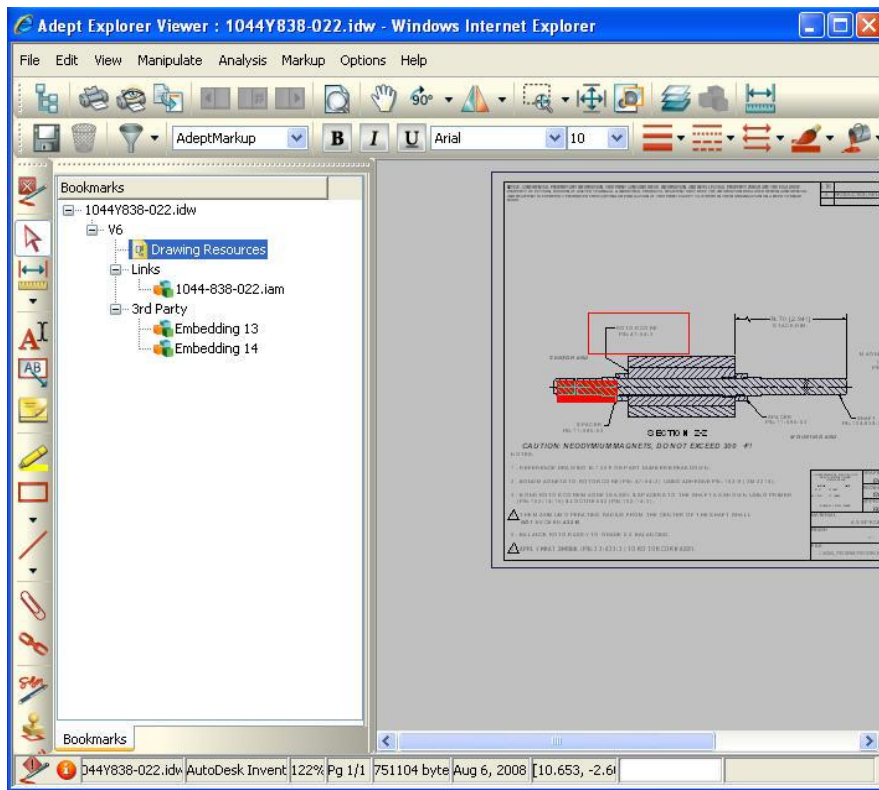
A right-click menu gives greater control over column sets.

**URL feature lets you share a file** - In Adept Web Client, you can obtain a URL for a file, and then send that URL to other Adept Web Client users or to another program, such as Sharepoint, which knows how to open Adept Web Client browser.

**Email notifications include Adept Explorer link** - It is now possible for Adept email notifications to include a URL link that will take you directly to your Adept Web Client Inbox, where you can access the file. This feature makes it easier for Adept Web Client users to participate in workflows.

**View, Print and Redline Documents** - Adept Explorer includes the full featured web-based Visualization component from Oracle, which displays over 300 native file formats, including AutoCAD, Autodesk Inventor, SolidWorks, Microsoft Word and Excel, PDF, and TIF.

Using the built-in viewer, non-CAD users can display, redline or print engineering and technical documents without need for expensive seats of CAD software, enabling collaboration and enhanced productivity across the enterprise.



*Adept Web Client Viewer displays redline mark ups.*

**Assign documents to other users** – Adept Explorer allows users to assign documents to other users to initiate work or request a review, uniting users and teams through a central database.

**Copy files** – Users with appropriate permissions may download a copy of a file from within Adept Web Client.

**File relationships** – Adept manages the complex parent-child relationships of AutoCAD XREFs, Inventor and SolidWorks parts, assemblies, and drawings, and supports the creation of file relationships between documents of any type. Adept Web Client users can view these relationships, including information about where the part is used, and in the case of SolidWorks files, which configuration is used, offering a more complete view of a project or product structure.

FileName	Status	Library Name
100.SLDPRT	In	SolidWorks Cox Engine
101.SLDPRT	In	SolidWorks Cox Engine
102.SLDPRT	In	SolidWorks Cox Engine
103.SLDPRT	In	SolidWorks Cox Engine
106.SLDPRT	In	SolidWorks Cox Engine
107.SLDPRT	In	SolidWorks Cox Engine
109.SLDPRT	In	SolidWorks Cox Engine
110.SLDPRT	In	SolidWorks Cox Engine
111.SLDPRT	In	SolidWorks Cox Engine
112.SLDPRT	In	SolidWorks Cox Engine

*Adept Explorer's Relationship Browser WIP: Versions View*

**Revision information** – Adept ensures proper revision control for all files it manages, and can automatically save previous revisions as required. Adept Explorer enables users to view this revision information at a glance.

**Workflow status** – Adept offers the ability to create pre-defined document workflows, ensuring the appropriate approval cycle has been completed prior to release to other departments, contractors or customers. Adept Explorer allows users to view workflow status, including steps completed and remaining, facilitating a clear view of project or product status.

**Audit trail** – Adept Explorer users have access to Adept's Audit Trail, which maintains a record of the activity on each document throughout its lifecycle. The audit trail helps organizations comply with industry standards, navigate legal issues, and visualize inefficiencies in their existing processes and workflow.

**No workstation installation** – Adept Explorer does not require an installation on the client workstation. For details on workstation system requirements, see the Adept 2011 Web System Requirements at [www.SynergisSoftware.com](http://www.SynergisSoftware.com).

## **Adept Reviewer Capabilities**

When users log in to Adept Web Client, if they are authorized for Adept Reviewer, their Web Client will automatically include all the functionality of Adept Explorer, plus the ability to Approve and Reject records and edit Library Cards.

### **Approve, Expedite Approve, Final Approve**

When you are a reviewer at a step on a document's Workflow, you will have the ability to Approve the file, which moves it to the next step in the Workflow.

Expedite Approve gives users with appropriate rights the ability to select the step to which this document will be approved. In Final Approve, the document will be moved forward all the way to the end of the Workflow and back into the Library.

### **Reject and Expedite Reject**

When you are a reviewer at a step on a document's Workflow, you will have the ability to Reject the file, which moves it to the previous step in the Workflow. Expedite Rejects gives users with appropriate rights the ability to select the step to which this document will be rejected.

### **Edit Library Cards**

You will also the ability to edit Library Cards. This capability in Adept Reviewer allows you to change some field values as well as editing the memo field.

Adept Explorer - Library Card

Mechanical Data View Save Cancel Help **Edit Mode**

Document Info	Change Notice Info	Product Info	Transmittals	Memo	Thumbnail
Filename	tim_5.rtf				
Library:	842_vault\checked_custom				
Owner					
Last Owner	John_Admin				
Status	Hold	Active Workflow Step	Tim's Three-Step - Step 1		
Product Series		Product Name	CM400		
<b>Drawing Title Block</b>					
Drawing Title				Date Drawn	
				Drawn By	Jerry Wu
				Job No	1234
				Scale	
Part No		Revision	G		

*Adept Reviewer's Library Card Edit Mode*

Because of differences between Adept Desktop and Adept Web Client, your Adept Administrator may choose to disable editing fields in Adept Reviewer. These fields which are made un-editable on the Web Client will appear in Adept Reviewer Library Card in an inactive state and cannot be edited.

*Note: This action of disallowing editing fields on the Web Client will have no effect on the ability to edit the fields in the Desktop version of Adept.*

Thank you for using Synergis Software products. Further information about the Adept Web Client can be found by clicking the Question Mark button on most Web Client windows.

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