



Adept Explorer: Learning the Basics

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What is Adept Explorer?

Adept Explorer is a web-based application that allows access to the files managed by Adept. Adept Explorer offers a powerful subset of the capabilities included in Adept's full featured Desktop client. Without installing Adept's desktop client software on a workstation, you can:

- Search for files based on information contained in the Library Card
- View files, data associated with files (metadata), revision information, audit trails, and file relationships
- Print a document
- Redline a drawing or document by adding comments or sketches
- Download a copy of the file to a user's PC
- Assign a document
- Unassign a document
- Copy the URL of a file so you can send it to another Adept Explorer user

Adept Explorer is designed for individuals who need to access documents or information about documents in Adept, but who do not need to create or edit the documents themselves.

Searching

Adept Explorer's Search Card lets you search for files based on any combination of data fields in your database. This data, sometimes known as metadata, is commonly extracted from the file when it is synchronized into Adept's database.

The screenshot displays the 'Adept Explorer Search Card' interface. At the top, there is a navigation bar with 'FileGuide', 'Search', 'Admin', 'Column Sets', and 'Help'. Below this, the 'Library Card' section shows 'Complete Data' as a dropdown menu, followed by 'Search' and 'Clear' buttons, and a 'Search Key' field containing the text 'acad'. A tabbed interface below the search fields includes 'Synergis', 'Gen Docs', 'Engineering', 'Inventor Properties', 'SolidWorks Properties', and 'Memo'. The main search area contains several input fields: 'Filename' (with 'acad' entered), 'Library' (dropdown), 'Status' (dropdown), 'Drawing Number' (input), 'Revision' (checkbox), 'Title' (input), 'Designer' (input), 'Size' (checkbox), 'Scale' (input), 'Sheet' (input), 'Client' (input), 'Address' (input), and 'Document Type' (dropdown). At the bottom, there is a 'Comment 1' field.

Adept Explorer Search Card

Search Results

When Adept performs the search, all the files that match your search criteria are displayed in the Search Results.

The screenshot shows the Adept Explorer Search Results page. At the top, there is a navigation bar with the Adept Explorer logo, the title 'Search Results', and user information '(ADM) Logout'. Below the navigation bar are links for 'FileGuide', 'Search', 'Admin', 'Column Sets', and 'Help'. On the right side of the navigation bar, there are radio buttons for 'WIP' and 'Library'. Below the navigation bar, there are navigation controls including '<<', '<', 'Page 1 of 1', 'goto', '>', and '>>'. Below these are buttons for 'Library Card', 'Relationship Browser', 'Download', 'Assign', and 'Unassign'. The main content area is a table with the following data:

Status	Filename ^	View File	URL
In	SAVED_VIEWS_1.dgn	View File	URL
In	Scenic001.jpg	View File	URL
In	screw flat #10 x.SLDPRT	View File	URL
In	SELECTION1.dgn	View File	URL
In	SOLIDWORKS RIM.SLDASM	View File	URL
In	SOLIDWORKS RIM.SLDDRW	View File	URL
In	Spring Face Seal-1 1-2.in.ipt	View File	URL
In	SQUARE.dwg	View File	URL
In	sse_vert_line.jpg@76e64720.f9f94ddf	View File	URL
In	sse_vert_line.jpg@ba0a8678.dc06498c	View File	URL
In	ST2001.0000.dwg	View File	URL
In	ST2001.dgn	View File	URL
In	ST2001.dwg	View File	URL
In	ST2002.0000.dwg	View File	URL
In	ST2002.dwg	View File	URL
In	startstopbutton.SLDPRT	View File	URL
In	STRETCH1.dgn	View File	URL
In	Stud 8-32 prs flush.SLDPRT	View File	URL
In	SV-262e4.png	View File	URL

At the bottom of the table, there are navigation controls including '<<', '<', 'Page 1 of 1', 'goto', '>', and '>>'. Below these are the text '1 - 19 of 19' and the caption 'Adept Explorer Search Results'.

The FileGuide

You can use the FileGuide to browse through files. The FileGuide displays files organized in a variety of pre-defined hierarchies, known as Views. These Views are pre-defined by the Adept Administrator. You are already familiar with the way that Microsoft® Windows® uses a hierarchy of folders based on folder names only. Adept Explorer's hierarchical structure is far more flexible, allowing the Administrator to create unique views into your files based on any combination of database fields.

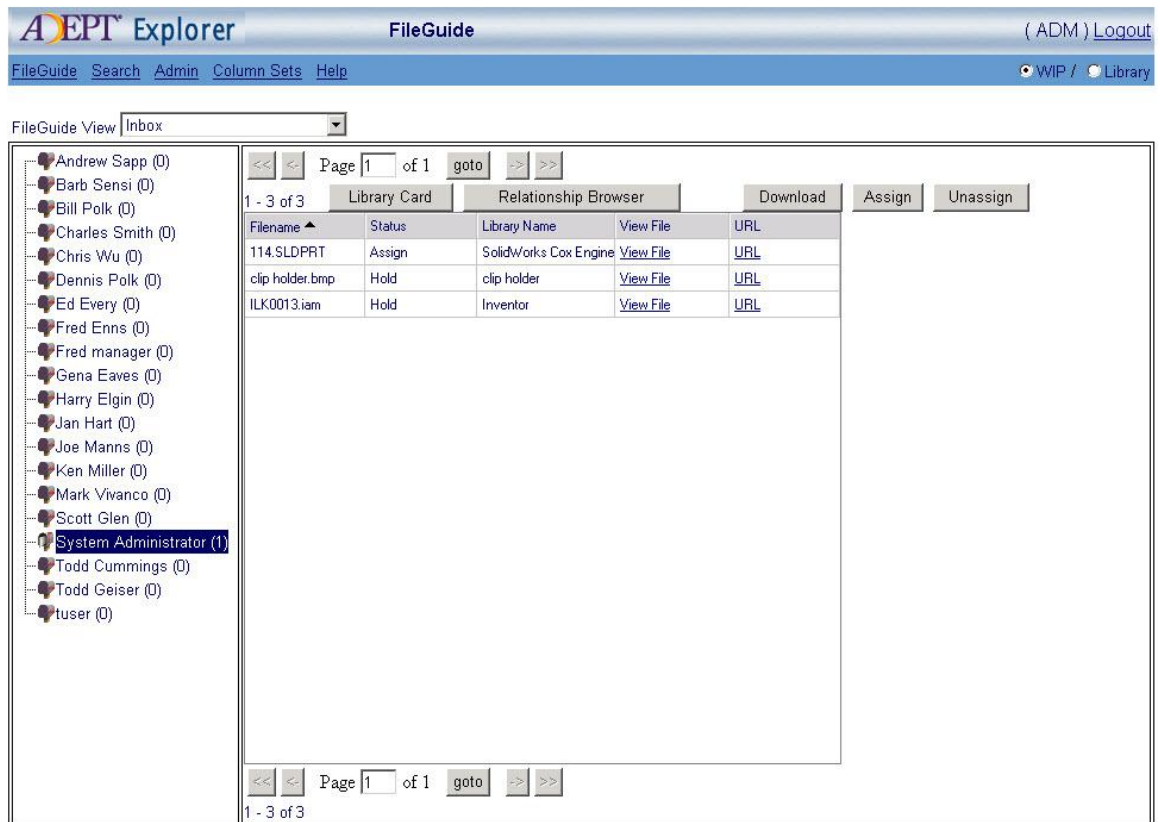
The screenshot shows the Adept Explorer FileGuide interface. On the left is a file tree with folders like '014-POWERLIFT (9)', 'AE_Test (1006)', 'AutoCAD 2008 (9)', etc. The 'AE_Test (1006)' folder is selected. On the right, a table displays a list of files with columns for Status, Filename, View File, and URL. The table shows files like '2009 ACAD 0.dwg', 'ae test 0.docx', etc. Navigation controls like 'Page 1 of 51' and 'goto' are visible at the top and bottom of the table area.

Status	Filename	View File	URL
In	2009 ACAD 0.dwg	View File	URL
In	2009 ACAD 2.dwg	View File	URL
In	2009 ACAD 9.dwg	View File	URL
In	2009 ACAD.dwg	View File	URL
In	2300252441-1.TXT	View File	URL
In	ADEPT 8 SWX INTEGRATION.TXT	View File	URL
In	ae test 0.docx	View File	URL
In	ae test 1.docx	View File	URL
In	ae test 10.docx	View File	URL
In	ae test 100.docx	View File	URL
In	ae test 101.docx	View File	URL
In	ae test 102.docx	View File	URL
In	ae test 103.docx	View File	URL
In	ae test 104.docx	View File	URL
In	ae test 105.docx	View File	URL
In	ae test 106.docx	View File	URL
In	ae test 107.docx	View File	URL
In	ae test 108.docx	View File	URL
In	ae test 109.docx	View File	URL
In	ae test 11.docx	View File	URL

Adept Explorer FileGuide

Inbox

One special View in the FileGuide is called the Inbox. The Inbox shows the files that have been assigned to you.



Adept Explorer Inbox

When you Assign a file to another user, the file will appear in the Assignee's Inbox.

More about the Search Results and FileGuide

In the Search Results and FileGuide windows, the columns can be selected by picking a Column Set.

From the Search Results and FileGuide windows you can:

- View files
- Download files
- View the Library Card associated with the selected file
- Assign or Unassign files
- Copy the URL of a file so you can send it to another Adept Explorer user
- Display more information about a file in the Relationship Browser

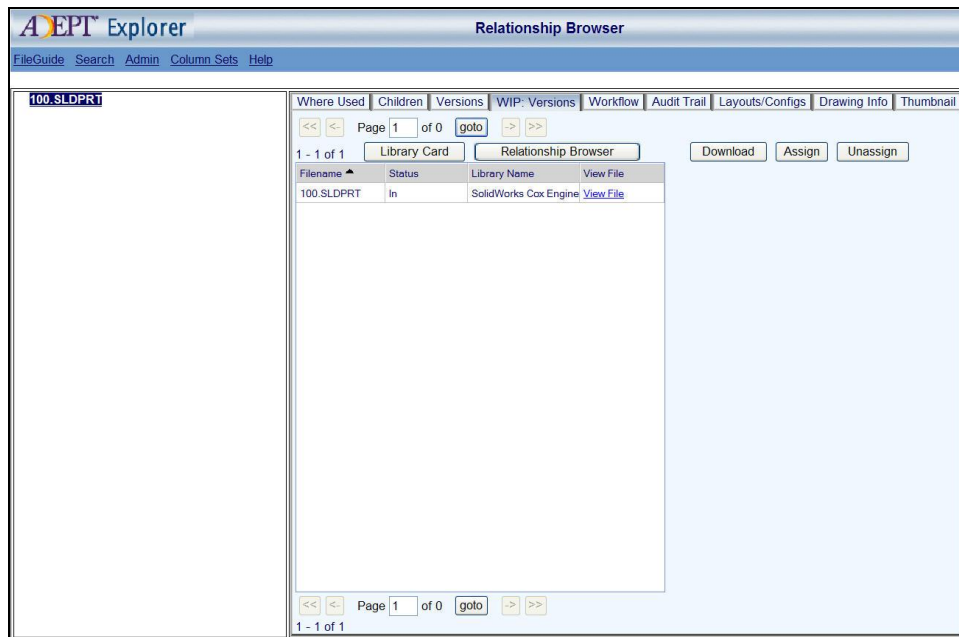
Relationship Browser

The Relationship Browser displays a variety of information about the file. The first two tabs of the Relationship Browser contain information about the relationships among files. Adept tracks relationships created by CAD applications as well as relationships that are manually created by Adept Desktop users.

For example, in mechanical 3D CAD systems, such as Inventor or SolidWorks, Adept manages file relationships between assemblies parts and drawings. Adept also manages Xref relationships in 2D AutoCAD. Maintaining the link between all file relationships is crucial for the integrity of the documents.

In the Adept Desktop, a user may create a relationship among files of any type. These manually created relationships can help users track files by collecting them together. For example, a Microsoft Word document might describe a specification or an Engineering Change Notice. Then the user in Adept Desktop could create a relationship between the parent document, and the other documents that it refers to. All of these relationships can be seen in the Hierarchy tree on the left of the Relationship Browser, and more information can be seen in the Children and Where-Used tabs on the right.

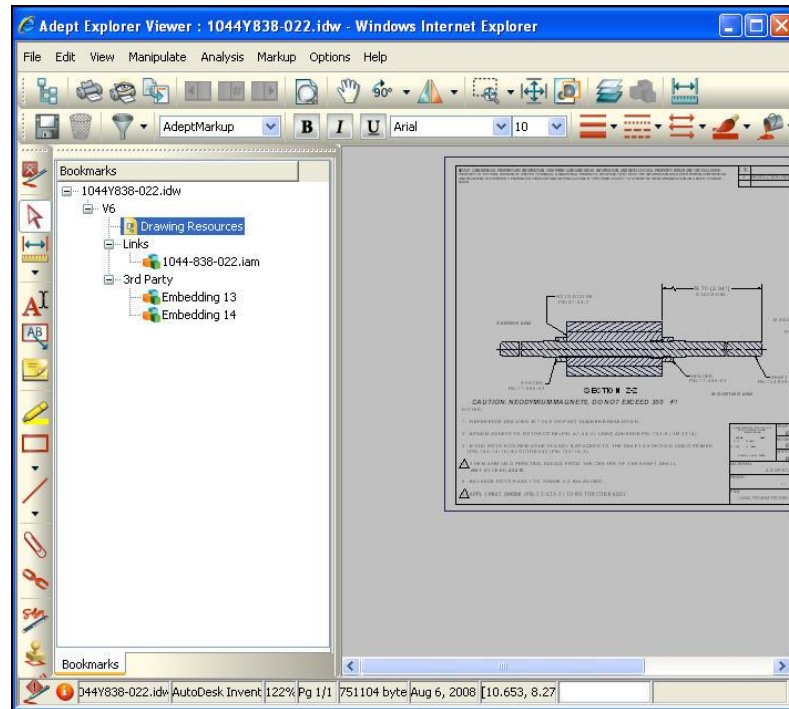
- Where Used – A list of the files that use the selected file.
- Children – A list of the files that are used by the selected file (parent).
- Versions – A list of the released versions of the selected file.
- WIP: Versions – A list of the Work in Process versions of the selected file.
- Workflow – A summary of the routing/approval process for the current file.
- Audit Trail – A historical list of the operations associated with the file.
- Layouts/Configurations – A list of additional sub-items in the document. For AutoCAD files, Layouts are displayed. For SolidWorks files, Configurations are displayed.
- Drawing Info – This is AutoCAD information about the DWG file.
- Thumbnail – A small version of the image (for supported files) if the file was saved with a thumbnail.



Adept Explorer Relationship Browser – WIP: Versions View

View File

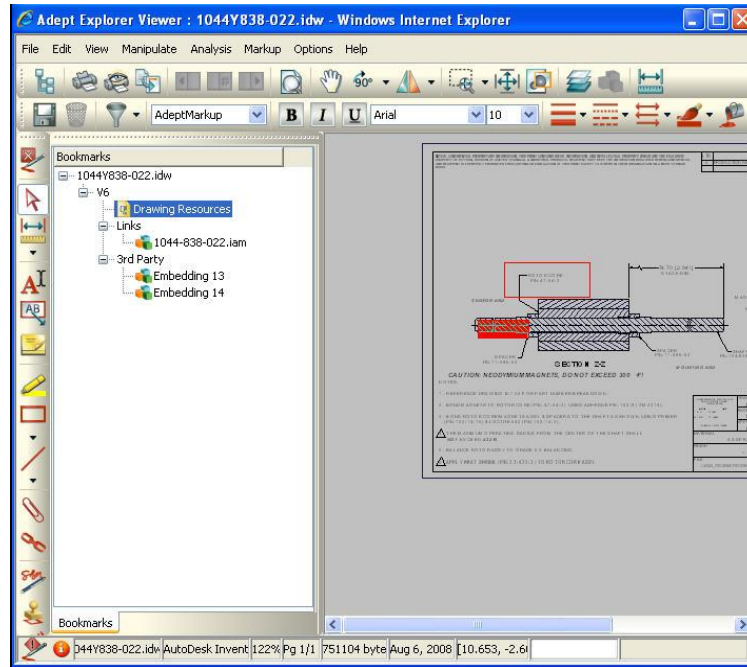
Clicking View File displays the file in the Adept Explorer viewer. The Adept Explorer Viewer displays more than 300 file types without the need to own a copy of the software that created the files. The Adept Explorer Viewer allows users to zoom in and out, pan, and other typical functions of a viewer.



Adept Explorer Viewer

Viewer Redlines

The Adept Explorer Viewer provides the ability to add text, lines, or other standard redlining elements. These redlines are not a part of the file, but are added to the Adept database and can be viewed in Adept Explorer—the file itself remains unchanged. Only users with assigned Library Access rights are able to save redlines.

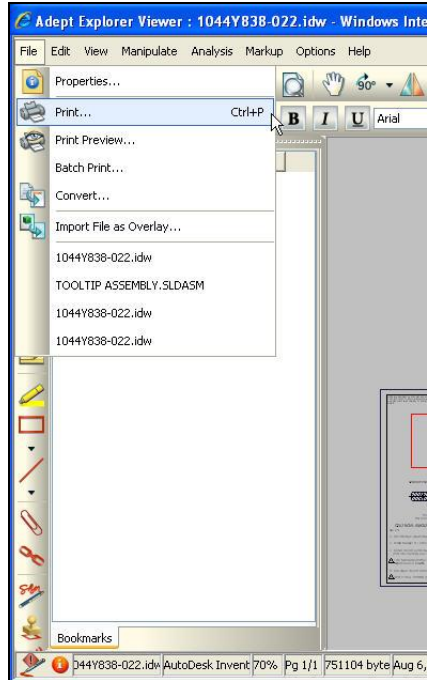


Adept Explorer Viewer with Redlines

Note: The first time you save redlines for a specific document, you must select an Adept Vault in which you want to save the redlines.

Viewer Printing

To print from the Adept Explorer Viewer, choose **F**ile **P**rint from the menu. The prints generated by the Adept Explorer Viewer may differ slightly from those produced using the native application.



Printing from the Adept Explorer Viewer

Download

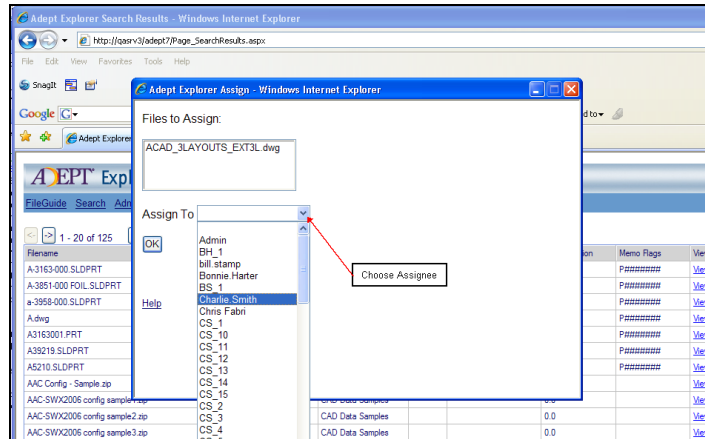
Users with proper permissions, can download “zipped” copies of files to their desktop. Copies cannot be signed back into the Adept desktop client. To download a file, select the file to download and click . You have the option to include children with the download and/or choose a Zip password.

Note: This feature uses a Popup window. To successfully execute it, you must disable your pop-up blocker(s).

Assign

To Assign a file to another user, select the file and click . On a separate page, Adept Explorer displays a list of the users to whom you can assign the file. Once a user is selected, the file(s) you assign will appear in that user’s Inbox. That user becomes the Owner of the file.

Note: This feature uses a Popup window. Please temporarily disable any pop-up blocker so the list of potential assignees can be displayed.

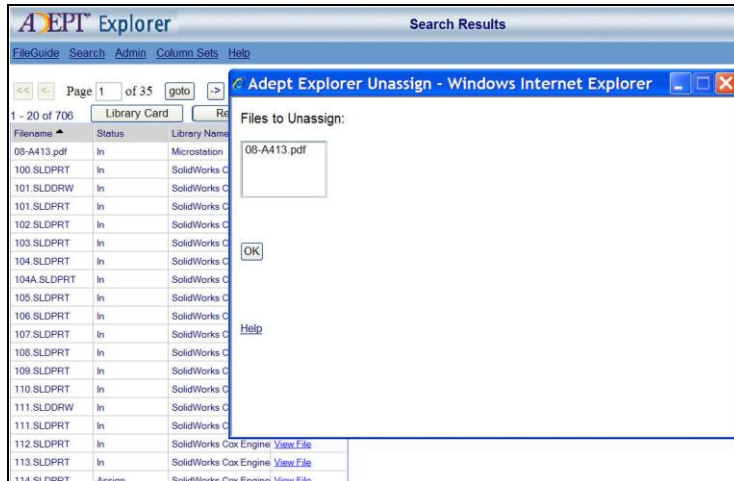


Adept Explorer Assign Window

Unassign

Unassign reverses the effect of the Assign command. To Unassign a file, select the file and click . If you already assigned a file and want to regain ownership, click . If a file was assigned to you and you are the current owner, you can Unassign it. The status will return to In.

Note: This feature uses a Popup window. To successfully execute it, you must disable your pop-up blocker(s).



Adept Explorer Unassign Window

For further information or a demonstration, please contact your Synergis Software Account Manager at 215.529.9900 or 800.836.5440 or visit www.SynergisSoftware.com.