



Understanding Adept's Two Clients

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To accommodate the needs of a variety of users throughout an organization, Synergis Software offers two types of Adept clients: Adept Desktop Client and Adept Explorer. This document will help you understand which client suits the needs of each of your users.

Adept Desktop: Adept Desktop is the full featured Adept client for those people who need to create and modify documents and information, and for those administering the Adept system. Adept Desktop is an easily deployable thick client offering all of Adept’s power and capabilities from a simple, easy-to-use Windows interface. Adept Desktop users can create, modify and view documents along with their associated metadata and relationships, and have full access to Adept’s powerful CAD integrations. Adept administrators can import documents, add users and groups and control permissions, create and modify workflows, and much more.

Adept Explorer: Adept Explorer is a thin, web-based client designed for those users who need to access and review documents and information stored in Adept in primarily a read-only mode. 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 provides the same powerful viewing capabilities found in the Desktop client for AutoCAD, Inventor, SolidWorks, Word, Excel, PDF, TIF, and hundreds of other formats, and Explorer allows users to view revision information, file relationships, the status of a workflow, and the audit trail of any document throughout its lifecycle.

Adept Desktop and Adept Explorer Capabilities Comparison

	Adept Desktop	Adept Explorer
Search Adept database using the Library Card	X	X
Search Adept database using the FileGuide	X	X
Change Information Source WIP/Library	X	X
View a file in the Viewer	X	X
• Create redline/markups in the Viewer	X	X
• Print Files from Viewer	X	X
Copy/Download files to local workstation	X	X
Zip files	X	X (during download)
View Library Card information	X	X
Assign/unassign files	X	X
Clear redlines from a file	X	X

Adept Desktop and Adept Explorer Capabilities Comparison (cont'd)

	Adept Desktop	Adept Explorer
Display of information in the Relationship Browser	X	X
Parent/Child Relationships of Files	X	X
Where Used" Information	X	X
Version list	X	X
Workflow status and progress	X	X
Audit Trail	X	X
Displays Layouts and Configurations	X	X
Drawing Info for AutoCAD files	X	X
Thumbnail View of the saved file	X	X
Inbox displays files assigned to you	X	X
Generate a URL that can be sent to any Adept user.		X
Add/Modify Metadata to Library Cards	X	
Sign in/Sign out files	X	
Rename, Delete, Move, Link files	X	
Approve/reject files	X	
Expedite approve/reject files	X	
Assume/Release ownership on files	X	
Send files to others via email	X	
Automated email notification on Adept events	X	
Create reports from files listing in Adept windows	X	
Create/manage a favorites list	X	
Create/manage manual relationships	X	
Create/manage library sets	X	
Create/manage work areas	X	
Enter, edit, or batch update library cards	X	
Batch open and save files	X	
Set user-specific options to control behavior	X	
Control/change toolbar buttons	X	
Launch file into native application from Adept	X	
Save/manage search subsets	X	
Administer Adept system, including user, group, library access rights and workflow admin	X	
Archive/restore files	X	
"In the window" CAD Integration Support	X	
Extracting attributes, properties, thumbnails and file relationships from CAD designs	X	
MS Office Integration Support	X	
Extracting and Updating document properties form MS Word and Excel	X	
Custom (API-based) application support	X	

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

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