Hidden Treasure: Jewels of Wisdom

FROM THE ADEPT TECHNICAL TEAM

Glenda Betit & Darin Green

SYNERGIS SOFTWARE

Adept EXPERIENCE

Glenda Betit

CUSTOMER EXPERIENCE ARCHITECT, SYNERGIS SOFTWARE

- ✓ 13 years at Synergis providing support for our customers as a Document Management Specialist, Project Manager, and Customer Experience Architect

- ✓ 40 Years of IT experience in network engineering, technical project management, compliance, service and support

Darin Green

DIRECTOR OF CUSTOMER SUPPORT, SYNERGIS SOFTWARE

- ✓ Civil Engineering Background
- ✓ AS Degree in Computer Programming
- ✓ 25+ Years in Data Management and CAD

In the realm of technology, standing still is the same as moving backward; innovation is not a luxury, but a necessity.

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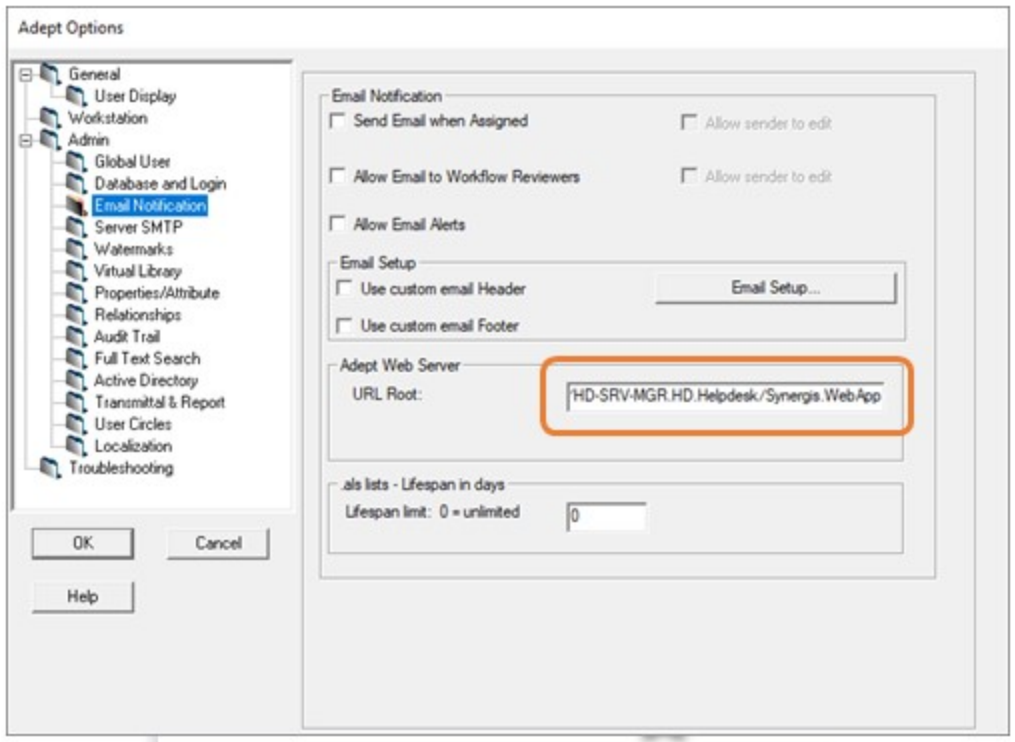
Top Support Solutions *Revealed*

- ✓ No Task Manager Running
- ✓ Web Client – Admin Settings
  - ✓ Editable Fields
  - ✓ Full Text Search Location
- ✓ Email Links aren't working
  - ✓ Check Email Notification – Adept Options
  - ✓ O365 – open port 587/MS Exception



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Top Support Solutions - continued

- ✓ Rename Freezes @ 100%
- ✓ Slow or delayed Logins
- ✓ Recovering your ADM password
- ✓ Search card is slow to open

Top Support Solutions – Adept Viewer

- ✓ Best Practices for printing and exporting PDFs
- ✓ Server-side rendering
- ✓ Delayed/Slow viewing
- ✓ Blurry Markups in Fall ‘22 & Spring ‘23

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Improving Search Results

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Saved Searches

- Files Checked Out By...
- Files in a specific workflow...

Adept Favorites
- Group records by projects, vendor, etc.

Enhanced Search

Locate records based on key search terms.
- Criteria based on custom or system fields.
- Locate records using different search keys.
- Search audit trail.

FileGuide Views

1. Used for common searches.
   Helpful tree listings to find data quickly.
2. Fields are indexed to increase performance.

Where to Learn More

1. Attend the Optimizing your Adept Environment training session on Thursday 8:30am-12pm!
2. Refer to help topics within Adept or contact our helpdesk for assistance.

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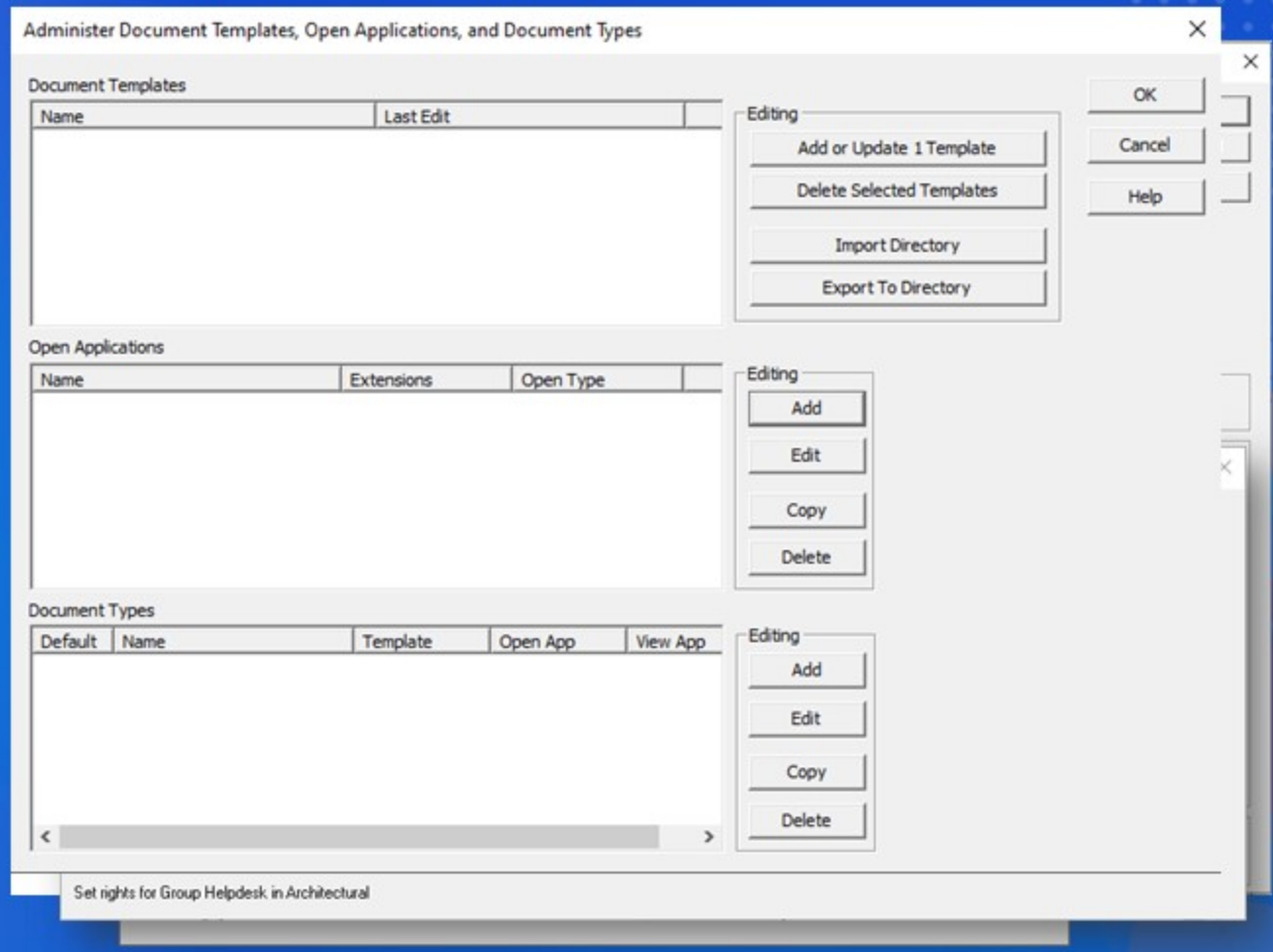
Admin Best Practices

- ✓ Assigning Permissions
- ✓ Work Areas
- ✓ Launch Applications, File Types
- ✓ Local Data Cache



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Admin Best Practices

- ✓ Non-configured Plugins
- ✓ Back up configurations
  - ✓ Publishwave Plugin
  - ✓ Restricted Lists
- ✓ Don’t let SSL Certificates Expire!
- ✓ Maintain control of user IDs/PWs
- ✓ The Benefits of a Sandbox

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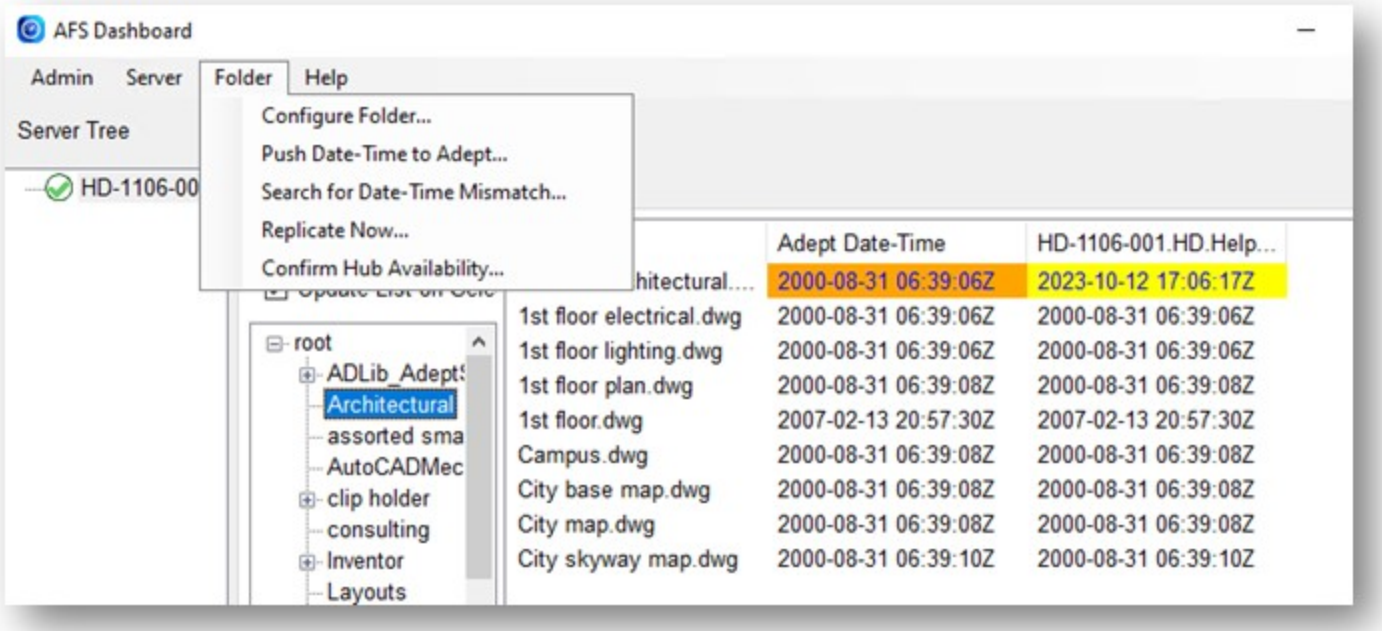
Adept File System Dashboard

- ✓ Admin menu
- ✓ Server menu
  - ✓ Binary differencing
- ✓ Folder menu
  - ✓ Date/Time Mismatch
  - ✓ File awaiting replication



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Building a Business Case for Enhancements

- ✓ What enhancement do you want to add? – Be Specific
- ✓ How will your company benefit from this enhancement?
- ✓ Is there an urgency?

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Adept Statistics Utility

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What is it?

The **Adept Statistics Utility** is an easy-to-run utility designed to collect data from your Adept database that will provide you and Synergis with valuable insights about your organization's use of Adept and will help us improve our products.

Why did we create it?

1. To help our customers understand how Adept is being utilized in their organization.
2. To allow Synergis and our customers to improve on overall performance and user experience by identifying opportunities.

How does it work?

1. The utility can be run from any workstation or server using SQL authentication.
2. It extracts key information from the Adept Database and creates a CSV and TXT files that can be used to create reports.

Where can I get it?

1. Included in our Install Package:
   Adept Summer '23 Client and Server Software (11.1.0) *Requires Adept Web*
   Or from our Knowledgebase:
   Adept Statistics Utility (synergissoftware.com)
2. See in action during our Optimizing your Adept Environment training session on Thursday 8:30am-12pm!