



Adept 2018

PREP GUIDE





WHY WE WROTE THIS GUIDE

We developed the Adept 2018 Prep Guide to make you aware of some important changes to Adept 2018 suite of products that you need to consider when you upgrade to this new version. After reading this guide, your upgrade process should go smoothly and without a hitch.

- Section One gives you a quick view of all the new product capabilities.
- Section Two contains detailed descriptions of features, considerations when upgrading, some known limitations and recommendations from our Product Management Team.
- Section Three addresses next steps and recommended reading.



SECTION 1

Adept 2018 New Product Capabilities at a Glance



ADEPT CREATOR 2018

- A new browser-based product, complementing and expanding on Adept Explorer and Adept Reviewer capabilities
- Includes all the features of Adept Reviewer, plus Check In, Check Out, Work Areas, and more
- Requires installation of Adept Client Services for local Work Area access and data extraction
- Adept Client Services (ACS) supports Word, Excel, PDF, MicroStation, and SOLIDWORKS **and does not require** local admin rights to install
 - The ACS component supporting AutoCAD extraction does require local admin rights to install
- Login to Adept Creator checks for ACS and prompts for installation or update
- Adept Creator does not support CAD integrations or Adept PlugIns, except for the extraction of CAD and Office documents

ADEPT INTEGRATION FOR SOLIDWORKS 2018

- The all new SOLIDWORKS integration uses Task Pane user interface elements and is now powered by Adept Web Services (WebAPI) technology
- Significant performance improvements for remote users
- Significantly faster login performance!
- Is no longer dependent on being logged into an Adept Desktop Client session
- Uses the same license as Adept Desktop Client. Shares a license on the same machine if a user logs in with both the Desktop and integration
- Updated Task Pane user interface gives access to Document Dashboard and more windows
- Numerous new commands available in the Task Pane context menu and ribbon
- **Does not support** Adept PlugIns or customizations, except for the extraction of CAD and Office documents



ADEPT DESKTOP CLIENT 2018

- Remains the primary Adept interface for Administrators and Transmittal users
- Includes significant usability improvements for both users and administrators
- **Requires** access to the Adept Web Server for license and connection management

ADEPT PUBLISHWAVE 2018

- Documents no longer downloaded to Adept Desktop Client by PublishWave PlugIn and then included in job submission to PublishWave server
- Documents are acquired by PublishWave Server for processing as needed
- Both PublishWave and PublishToAdept log into Adept through the Adept Web Server
- Neither PublishWave nor PublishToAdept requires a dedicated Adept license; they use internal Adept access tools
- Each PublishWave Server and PublishToAdept program is dedicated to a single Adept system
- PublishToAdept **cannot** engage Adept PlugIns or customizations as part of the Check In process

ADEPT CUSTOM PROGRAMS

- Custom Programs are not supported by Adept 2018 products that are powered by the Adept Web Services. These include:
 - Adept Explorer, Adept Reviewer, Adept Creator
 - Adept PublishToAdept
 - Adept Integration for SOLIDWORKS 2018
- Future releases of the Adept Web Server are planned to provide API access for Custom Programs



SECTION 2

Product Details and Recommendations

ADEPT CREATOR 2018

Adept Creator provides all the features of Adept Reviewer, plus the ability to:

- Check Out
- Check In
- Create and access Adept Work Areas
- Extract documents in Adept Work Areas (CAD, Word, Excel, PDF)
- View an expanded Ribbon for these new commands:
 - Send To
 - Create Relationships
 - Search for Children
 - Create New Documents
 - Undo Check Out
 - Clear and Refresh Extracted Data

To assign users to a specific web client license—either Adept Explorer, Adept Reviewer, or Adept Creator—you use the Adept user profile dialog in the User, Group, Library Administration window. Based on your user profile settings, you log into Adept with the web user type you have been assigned.

Adept Creator Requirements

- To access all the new Adept Creator capabilities, you must install a new Adept component: Adept Client Services.
- Adept Client Services (ACS) is a small download that enables Work Area access and local data extraction. It is similar to downloads we install for everyday apps such as OneDrive, iTunes, Dropbox and other popular cloud apps.
- When you log in using your Adept Creator license and then install the ACS, you may access all the new Creator capabilities. Without the ACS install, you will only have access to the Adept Reviewer capabilities.
- The “Client Services Install” option downloads and installs the necessary components to access Work Areas and to extract data from Word, Excel, PDF, MicroStation and SOLIDWORKS files. You do not need to have local workstation administrator rights to install this option.
- Additionally, to extract data from AutoCAD, you must also install the “RealDWG Install” option. This option does require local workstation administrator rights.

Adept Creator: Important Considerations

As an Adept Creator user, you can check documents in and out. However, for the full CAD integration experience you must use the Adept Desktop Client, along with an Adept supported integration,

- Adept Creator users cannot check out a parent document, open it, and have the document references resolved to the Adept Virtual Library. These capabilities are only available with the Adept Desktop Client along with an Adept supported integration or if you are using the Adept Integration for SOLIDWORKS 2018
- Adept Plugins are not supported in any version of the Adept Web Client



ADEPT INTEGRATION FOR SOLIDWORKS 2018

Adept 2018 features a newly developed CAD integration with SOLIDWORKS that uses the Adept Web Server and has no dependency on the Adept Desktop Client application. With Adept 2018, SOLIDWORKS users will no longer need to log in to Adept through the Adept Desktop Client application.

The new integration delivers excellent performance and new features; for example, workflow approve and reject, a document dashboard, and the ability to create manual relationships. With Adept 2018, the new integration only supports SOLIDWORKS 2018. Other integrations will follow in Adept service packs and updates. Until then, Adept's integrations for AutoCAD, Autodesk Inventor, and Navisworks require an active Desktop Client session to work.

Besides the new Web Server connection, there are many other improvements to the integration, including the ability to:

- Participate in workflows by approving, rejecting, and rerouting documents
- Select language in the Adept Login screen
- Create new documents in the Adept Work Area
- Manage the Virtual Library using commands to clear and refresh
- Access the Send To command
- Access documents in Work Area, FileGuide, Favorites, etc.
- Use the Document Dashboard
- Load the integration faster when starting SOLIDWORKS
- Change Information Source
- Create and edit manual relationships
- Clear and refresh extract documents

NOTE: Update training is available from our professional service staff and from videos on our website.

NOTE: An Adept Desktop Client license is used to log into the Adept Desktop Client or the Adept Integration for SOLIDWORKS 2018. If a user on the same machine logs into both, only one license is used.

NOTE: Only the Adept Integration for SOLIDWORKS 2018 is based on the Web Server architecture. Previous versions of SOLIDWORKS supported by Adept use the existing Adept integration architecture which requires an active Desktop Client connection.

Adept Integration for SOLIDWORKS 2018 Important Considerations:

Adept's Integration for SOLIDWORKS 2018 cannot access any of the Adept PlugIns. Features such as Required Fields, AutoName, PublishWave, and others are not available for SOLIDWORKS 2018 integration users at this time.

ADEPT DESKTOP CLIENT 2018

Adept 2018 includes many user experience enhancements and improvements to the Adept Desktop Client:

- A new “Check Out and Open” command
- The addition of the “Refresh View” command in the Work Area context menu
- The ability to drag and drop columns in the primary windows (not Document Dashboard)
- The ability to create folders in the Favorites window and organize items into these folders
- The ability to export and import contacts and companies in the transmittal database
- The ability to select contact instead of a company when working with transmittals
- Improved transmittal field handling for large amounts of data
- Improved “Add Column” dialog by organization and filtering of fields
- Improved handling of column widths in the Document Dashboard
- New override rights option for Restricted List batch updating
- Larger Administer All Shared Work Areas dialog
- A workflow report that includes the document’s entire workflow history
- Increased support for Append and Refine searches after Search All Fields
- Ensured display of appropriate icons in Adept for SOLIDWORKS documents
- Eliminated limit on the number of rows displayed on the Version tab of the Document Dashboard
- Numerous improvements to Ribbon Sets and Ribbon Set Manager
- Numerous improvements to handling and display of localized text strings

For administrators, there are also many enhancements, including:

- The ability for workflow administrators to easily handle hundreds or even thousands of workflows
 - Multiple administrators can edit different workflows simultaneously
 - Filtering the list of workflows
- An Adept administrator command to identify and delete empty Libraries
- The ability to customize email notification subject lines to include Adept data field names and values
- Improved ability to make changes in Designer while the Adept system is running
- More details in login report to include client type, group disabled users, locked licenses, and more
- A new right to “Clear Redlines” separate from Workflow Manager category rights
- Global option to not validate work areas on login of users
- Improved performance when managing large numbers of document templates
- Many standard reports have been improved with more details and better formatting
- Support for Adept Creator in the User Profile dialog

NOTE: If you only plan to use the Adept Desktop Client with the Adept Server, **it is still necessary to install and configure the Adept Web Server** to access the new Adept License Manager.

ADEPT PUBLISHWAVE 2018

With Adept PublishWave 2018, documents are no longer downloaded to the Adept Desktop Client by the PublishWave PlugIn and then included in a job submission to PublishWave server. Now the PublishWave Server acquires documents directly for processing as needed! This new capability significantly reduces the amount of time needed to submit jobs to PublishWave.

Similarly, the PublishToAdept component no longer uses the Adept Desktop Client loaded on the PublishToAdept workstation to connect to Adept for check in processing. Instead, it uses an Adept WebAPI to connect to the Adept Web Server. With this change, you no longer require Adept licenses for acquiring or checking in documents. Instead, you can use the dedicated Adept Desktop Client license previously allocated to PublishToAdept for other users.

PublishWave 2018 Important Considerations:

- The PublishWave Server is now configured to access and utilize one Adept Web Server. There is no longer a way for a single PublishWave Server to process input from multiple Adept Servers.
- Adept PlugIns are not supported in the PublishToAdept component used to check in documents. PublishToAdept uses an Adept WebAPI login for connecting to the Adept Web Server and bypasses the Adept Desktop Client.

ADMINISTRATIVE CONSIDERATIONS IN ADEPT 2018

New Authorization Codes Required

Adept 2018 and Adept PublishWave 2018 both require a new Authorization code. Be sure to acquire a new authorization code before upgrading your Adept system, so as not to delay your Adept 2018 implementation.

Licensing Management Changes

The Adept Licensing Tool has been updated for Adept 2018 and must now connect to Adept through the Adept Web Server. Without a connection to the Adept Web Server, you cannot log in to Adept with any Adept Client—be it Desktop or Web.



ADEPT 2018 CUSTOM PROGRAMMING CONSIDERATIONS

Consider updating your custom programming before updating to Adept 2018. Please call or email your Adept Account Manager to schedule a discussion with our Application Development team.

If you are using custom programs developed to enhance your company's Adept use, we want to help provide clarity regarding which Adept client versions support the custom development and which do not.

These Adept 2018 components that now rely on the Adept Web Server do not support Plugins or custom programs enabled in the Adept Desktop Client:

- Adept Explorer, Adept Reviewer, and Adept Creator
- Adept PublishToAdept
- Adept Integration for SOLIDWORKS 2018

By way of example, if you have a custom program that is triggered when users check in a document, it will not trigger during check in using Adept Creator or the SOLIDWORKS 2018 Integration.

NOTE: Future versions of Adept Web Clients and Web Server-based components will support Plugins and integrated custom programs.



SECTION 3

Next Steps



NEXT STEPS

As you prep for an upgrade to Adept 2018, we strongly recommend that you take the time to thoroughly review the following documents that are included in the installation ZIP file:

What's New in Adept 2018: Includes a comprehensive description of all the new features along with screen shots.

Adept 2018 Update Notes: An in-depth look at all the new features, known limitations, enhancements and fixes that are included in all the Adept 2018 products.

Adept 2018 System Requirements: Provides all the details you need to successfully install and run Adept 2018, including the Adept Server, Adept Web Server, Adept Desktop Client, Adept Web Clients, and Adept Task Pane.

Upgrade to Adept 2018: A step-by-step-guide to installing Adept 2018 at your location.

Adept 2018 Installation and Administration Guide: Walks you through each step of a new Adept installation. You can learn more details of installation and administration by reading the Adept Administration Guide.