What’s New in Adept 2015
Including all Service Packs and Hot Fixes
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WHAT’S NEW IN ADEPT 2015 (VERSION 10.0.0)

Adept 2015 provides companies better performance, easier and faster access to mission critical work and more meaningful ways to collaborate across multiple locations than ever before.

This release is designed to serve our growing and expanding customers with:

- increased software performance
- simplified administration
- global usability
- richer end-user experience

Adept 2015 contains hundreds of new features and improvements to existing capabilities and is the next step in the product’s ongoing evolution as a global business lifecycle management solution.

NEW FEATURES IN ADEPT 2015

NEW FEATURES IN ADEPT SERVER 2015

The Designer module has undergone some major upgrades to facilitate increased data integrity during upgrades and custom data field changes on large Adept databases.

- Changes to the database schema made from Designer are now transactionalized which means that all the changes get made or none of the changes get made if there was a problem. This eliminates problems that occurred if one of the schema changes failed but other changes succeeded. This is true whether you manually make the changes or load changes from a design (.DES) file created during a previous session or on another system.

- Changing a character type field to a numeric field type is no longer supported. Dropping an existing column and adding a new one will lose all the data in the dropped column. There is a way to preserve the data. Look into the help system or call the Synergis helpdesk for help on this issue.

- Adept and by association, Designer, no longer uses ODBC to communicate with the Adept database. They use ADO.NET instead. The dialog boxes that used to ask for ODBC information now asks for server information.

The PackageDB feature of Adept has undergone some major upgrades to facilitate use on very large Adept databases.

- A self-extracting executable is no longer created. Instead a regular zip archive is always created.

- No file exceeding 900MB is written to the zip file.

- If the zip file will exceed 2GB, it will be segmented into 1.9GB components. For example if the user is creating “test.zip” and it will be 3GB, PackageDB will produce a file test.zip of around 1.9GB and a secondary file “test.z01” of around 1.2GB. If additional files are
required for larger zips they will be named .z02, .z03, etc. This is a standard for extended zip files.

- To keep things orderly, PackageDB will create an additional subdirectory for the resulting zip file(s). For example if the user specifies “C:\Adept\Backup\Test.zip”, a directory “C:\Adept\Backup\Test” containing the files “Test.zip”, “Test.z01”, “Test.z02”, etc. will be created.
- The PackageDB dialog has been widened to accommodate reading the entire zip file name.
- Adept and by association, PackageDB, no longer uses ODBC to communicate with the Adept database. They use ADO.NET instead. The dialog boxes that used to ask for ODBC information now asks for server information.

**NEW FEATURES IN THE ADEPT DESKTOP CLIENT 2015**

**PERFORMANCE IMPROVEMENTS**

Adept 2015 includes some very important performance improvement changes. These changes make it possible for Adept to handle 10,000+ libraries and thousands of named users. AFS vaults have been brought in line with Direct and FTP vaults, performance-wise.

- Login time to Adept has been reduced to less than 20 seconds for most users regardless of how many libraries or users are configured in Adept.
- End User interruptions due to administrator changes have been reduced significantly.
- The time it takes to sign in the first document after logging into Adept has improved from minutes to seconds. The actual time depends on the document and the library settings.
- The performance of AFS vaults has improved in many cases by 4X.

**WORKFLOW**

Small but important improvements have been made to the configuration and use of Adept’s workflow capabilities to provide more Admin control and more efficient movement through a workflow.

- The Current Owner of a document on a workflow step can now be added to the notification list to receive an alert when the document has been on a step too long.
- The size of the description of a workflow step has been increased from 64 characters to 253.
- The list of available workflows to reroute to in Adept now presents in alphabetical order.

![Reroute Active Workflow](image)

*Rerouted Workflows now appear in alphabetical order.*
It is now possible to Expedite Approve or Reject **multiple** documents at the same time as long as the following conditions exist:
- All the documents are in the same workflow
- All the documents are being approved or rejected beyond any step that all selected documents are currently on.

You can now Expedite Approve or Reject multiple documents.

**WORK AREA**

Improvements have been made to improve usability and file integrity with in Work Areas.
- When opening documents that have been signed out but not all the child documents have been signed out, the child documents are copied to a special folder called the Virtual Library (VL). If those documents already exist in the VL, the documents do not need to be copied. However, now Adept is aware of any Size, Date, or Time mismatch between what it knows and the actual properties of the files in the VL and re-downloads the documents if there is a mismatch.
- The default location of the work area has been moved to “C:\Users\user.name\Documents\My Adept WorkArea” to better conform to Windows standards.
- Now users can get to a work area’s location in Windows Explorer by selecting Show in Windows Explorer from the right mouse click menu of the work area window.

Get to a work area’s location in Windows Explorer through a simple dialog box.
• Selecting the Current Work Area button on the bottom right of the Adept status area presents a dialog that allows the user to select and go to another work area. This is really convenient when users are using many work areas.

It's easier now to select and go to another work area.

**VIEWER**

A few improvements to navigation and in using Print Labels and redlines and have been made to the Adept Viewer.

• Print Labels used when viewing or printing a document can now include the Adept Software Version information.

• When multiple documents are open in the Adept Viewer, you can now use the CTRL+Tab keys to switch through the tabs that each open document is on.

• Detailed instructions have been added to the Adept Help on how to view Autodesk Civil 3D files using the Adept Viewer.

• It is now possible to view the redlines of previous versions of a document by using the glyph in the lower left corner of the Adept Viewer. Redlines from previous versions cannot be edited.

• The redline comment field has been lengthened to 84 characters to accommodate the date and time.

**USER, GROUP, LIBRARY ADMINISTRATION (UGLA)**

Library Management has been significantly enhanced. In previous versions of Adept, all the settings for a library had to be set explicitly on each and every library. This is no longer the case. In Adept 2015, the settings are grouped into:

- library properties
- access rights
- workflow settings
- replication settings

Each settings group can be set at a parent library or folder level, allowing the settings to flow down to children libraries. This flow-down or “inheritance” of settings can flow down separately for each group of settings. Even when data is flowing down for each settings group, it is still possible to set different values for child libraries explicitly.
This new capability allows for less data to be stored in Adept, thereby improving performance. It also streamlines an administrator's job of setting the many values for all the libraries in Adept.

The UGLA dialog now contains a dropdown list containing the 4 different “views” of library settings. Selecting a view from this dropdown list decorates the tree of libraries on the dialog appropriately from the perspective of that view. The glyphs and coloring that accompany each library in the tree all have meaning. Search the help system for Library Tree View for the meaning of those glyphs.

The UGLA dialog now contains a dropdown list containing the 4 different “views” of library settings.

Upgrading to Adept 2015 automatically removes any explicit library settings from child libraries that have identical access rights, properties, or workflow settings as its parent library. This will reduce the amount of data stored in Adept and makes it easier to administer the libraries. Since Replication settings could already be set to inherit in previous releases of Adept, there is no automatic setting to inherit for Replication settings when upgrading to Adept 2015.

- Set Children to Inherit Library is a new menu option on the UGLA tree right mouse click to set all the child libraries of a selected library to inherit some or all of the settings of the selected library.
You can now set all the child libraries of a selected library to inherit some or all of the settings of the selected library.

- Adept no longer manages the moving of actual files from one vault location to another. Admins must move the files and folders externally from Adept and then tell Adept about the moved files and folders new location through Move Library and other vault configuration activities. This change ensures a more successful movement of files and better data integrity within Adept. Because Adept no longer moves files, a new informational dialog is presented to the user when vault definitions change to help the user understand any additional steps that may be required.

- The Rename Libraries dialog has changed. The Rename Libraries menu item is now disabled when the library view is set to Library Folders and enabled when it is set to Library Names. This is necessary because folder names cannot be altered by this feature, only the Adept name for a library. To change the folder name of a library, the library must be moved using the Move Library Branch command.

- The Move Library command is now the Move Library Branch command and has been enhanced to allow an entire tree of libraries to be moved at once. Use the Rename Libraries command to change the name of a library and its children.
The Move Library Branch command allows an entire tree of libraries to be moved at once.

- There is a new feature in the UGLA to Copy Library and Paste Library settings from one library to one or more other libraries. You can paste all the settings for a library or just the access rights, library properties, workflow, or replication settings. This new feature is available from the right click menu of the UGLA library tree.

Now you can Copy Library and Paste Library settings from one library to one or more other libraries.

- The Clear Rights menu item on the right mouse click menu of the UGLA tree has changed to Clear Library Settings to allow the admin to clear Rights, Properties, Workflow, or Replication individually or all at once.
• It is possible for Adept Administrators to create Personal Groups based on traditional access right groups.

![Personal Groups section](image)

**An Administrator can create Personal Groups similar to traditional access right groups.**

See the Personal Groups section of this document and the Adept Help system for more details. Personal Groups that are based on traditional access right groups are not automatically kept in sync when the members of the traditional access right groups are changed. Because of this, there are now new glyph icons in the UGLA group lists that indicate when personal groups are based on access right groups and when they are out of sync.

• The access rights to a library that are enabled by default for each rights group has been updated to conform to more commonly found situations.

• The Set Library Workflow choice from the tree right mouse click menu has been removed. Setting the default workflow for a library must now be done on the Modify Library dialog.

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**TRANSMITTALS**

Due to the growing popularity of the Transmittal feature in Adept, this release exposes much of the previously inaccessible data pertaining to transmittals to help users understand how transmittals have been used.

• There is a new tab in the Relationship Browser (RB) dedicated to transmittals. The transmittal tab shows data about a transmittal document selected in a search results window or the FileGuide.

![Transmittal tab](image)

**There is a new Transmittal tab in the Relationship Browser.**

The data includes:

- The name of the template used to make the transmittal cover letter
- Send Date, Sent By, Sent To, and attachment options
- Transmittal custom values
What's New in Adept 2015

- The data on the transmittal tab (and all other tabs) can be saved as text by using the right mouse click menu on the transmittal tab.

- Transmittal Search – there is a new Transmittal Search capability located in the Search menu that allows a user to search for transmittals based on many different search criteria pertaining to the transmittal.

You can search for transmittals based on many different search.

- There is a new set of search options on the Search Card. By right mouse clicking in an empty area of the search card, a new menu appears listing several new search options including Special Searches, including Is Transmittal. Selecting this criterion will make the search return only transmittals in the search results.

- When a transmittal is sent by Adept, details about the transmittal are put on the memo tab of the transmittal’s library card. With this release, additional data about the transmittal is added, including: Distribution list name, contact name, company name, phone number, and email fax number.

Details about the transmittal are now available on the memo tab of the transmittal’s library card.

- When a transmittal is sent by Adept, the user now has the option to enable encryption when zipping the transmittal documents.

- Transmittal cover letters can now include the full list of members on a distribution list for the transmittal instead of just the name of the distribution list. The transmittal template
creator can dictate which data about each member of the distribution list should be displayed on the cover letter.

- Users can now convert transmittal attachments to PDF’s without the need to have local administrator rights on their workstation.

SIGN IN / SIGN OUT

In order to make Sign In and Sign Out actions more efficient, new features have been added that minimize the moving around of files that don’t need to be moved.

- When signing in multiple files, it is possible to perform multiple actions individually for each file, including some new actions.

When signing in multiple files, you can perform multiple actions on an individual file.

- The actions or settings that can be set on sign in per file are:
  - Select a library
  - Assign the file to a user
  - Understand if the file has changed since last sign out - new
  - Choose to keep the file signed out - new
  - Undo the previous sign out (if allowed) - new
  - Create a version (if allowed)

- Since there is a new capability for users to elect not to sign in files that have not changed, there is a new option for administrators to disable this capability and force all files to be signed in even if they have not been changed.

- On Sign Out, there is a new behind-the-scenes verification of File Size that occurs to ensure a successful download of files.

SHARING

A completely new feature added for Adept 2015 is the concept of Sharing. Sharing enhances Adept user collaboration by allowing users to share some of the work or configurations they’ve done in Adept with other Adept users.
The Share Manager lets you choose what you want to share with others in Adept.

The following items can be shared in Adept:

- Saved Searches
- Saved Favorite Lists
- Column Sets
- Library Sets
- Transmittal Templates
- Transmittal Searches
- Report Templates (File Reports and Audit Trail Reports)
- Personal Groups

See the Adept help system for details on how to share each of these items and what the options are when sharing. There are new options available for setting the default behavior when sharing. There are also options for Adept Administrators to share with everyone that uses Adept in the organization.

SEARCH

Significant changes to searching in Adept are included to allow users to be more specific about what they want to search for and how those searches can be saved and re-used.

A new Special Searches menu has been added to the Adept Search Card.
The Special Searches menu is accessible by right clicking inside the Library Card. It allows users to search for documents based on Adept meta-data such as searching for records that:

- are children
- are parents
- are transmittals
- need to be extracted
- have a mismatch of Size, Date, or Time in Adept versus the actual properties of the document.
- are known to have failed verification

- Saving, loading, and using search criteria have changed for this release. See the section of this document regarding the FileGuide Favorites View.
- The Search Card in Adept is now pre-populated with criteria from the last search that was performed. The criteria can easily be removed by selecting the big red X button on the search card. Even after you remove the criteria from a previous search, the knowledge of that search remains listed in the panel at the bottom of the search card so it can be used as a basis for appending or refining your search. For new searches, just use the “New Search” button at the top of the search card.
- When switching between the search card and the library card, Adept no longer forgets or loses the search criteria from the last search.
- F5 can now be used on the Search Results screen to re-run the previous search. In the past, F5 refreshed the data that was displayed but did not re-run the search.
- F6 or the View->Most Recently Used Files menu can now be used to display a list the 60 most recently accessed documents or records sorted in order of use.
- Search criteria can now be saved directly from the search results screen by right mouse clicking on the results and picking Save Search As from the menu that appears.
- The ability to select Show All Files from the Search menu or from the right click menu on the search card has been removed. Also, the ability to select Search from a blank search card and get a list of all records in the entire system has been removed for this release. A user can still enter an asterisk on the filename field and complete a search that returns all records.

**PLUGIN’S**

Several Adept PlugIn’s have been extended to support more and deeper MS Office product integration.

- MS Word Content Controls in the Available Data section of a Word document can now be mapped to Adept fields and the values can now be extracted from the document.
- The Adept Properties PlugIn now supports MS Office and MS PowerPoint 2013 format files.
- The Extract Text PlugIn that used to be included and loaded by Adept for the purpose of extracting text to be used by Full Text Searching has been removed as that function is now handled by another section of code.
The data importer Plugin has been updated to support MS Excel worksheets with up to 1,048,576 rows and 18,278 columns.

REPORTING

There is an all new reporting module in Adept 2015. With the results of a file, transmittal or audit trail search or a FileGuide listing, any user can create, run, publish, and share reports:

- Run a Quick Report
- Create a Report Template
- Share a Report Template with other Adept users
- Generate a report using a Report Template
- View the report, print the report, and export the report in several formats including PDF, XLS, TXT, CSV, HTML, and many more.

The report module puts file metadata onto the report for every file listed in the search. The format of the report is determined by the columns in use when the search is performed or by the template the user chooses when generating the report.

*Here is a sample report template.*

Report templates can be created by any user. They are owned by that user and can be shared with other users. Report templates can be created for file searches or for audit trail searches. When a user selects File--->Report in Adept, the user can choose to run a Quick Report or to Generate a Report.
You can run a Quick Report using the results of a file, transmittal or audit trail search or a FileGuide.

...for example, here is a sample Quick Report on a FileGuide.

Generating a report allows the user to select a template for the report. Using a Quick Report either uses the columns that are currently present in the search results or uses a template designated by an admin as the Quick Report default template in the Options dialog.

**PERSONAL GROUPS**

A personal group is a new feature in Adept 2015 that allows any user to define a collection of other users. The user can then use the personal group to share things like saved searches, favorite lists, and many other Adept constructs. By sharing your column sets, for example, with your personal group, anyone in the group can use the same column set. Personal Groups can also be used to help users manage their Adept Inbox.
You can use the personal group to share things like saved searches, favorite lists, and many other Adept constructs.

Personal Groups are designed for collaboration. They have no impact on file or data access or security.

OPTIONS

New options have been added to manage the new features added to this release. The changes are listed here and you can read up on the details in the help system.

- User Display – Sharing: configure default sharing rights
- User Display – Circles: activate Circles
- Admin – undo sign out: enable undo sign out
- Global User – date display formats: select display format for all users
- Database and login – Unique filename and library name per vault
- Database and login – Domain login options can now apply to the Adept Web Client
- Email notification – ALS lifespan: dictate how long ALS links are good for
- Email notification – Email Setup – Choose column set to display extra data in notification email and add Adept data field names and values to the email subject line.
- Print Labels – Insert Field Into: indicate Adept fields to add to print labels / watermarks
- Print Labels – Display print labels in viewer: enable the display of print labels in the viewer
- Relationships – Virtualize Manually Related Files: enable manually related files to be copied to the VL when opening files
- Audit Trail – Display Events for each Checkbox creates a report: run a report to understand what actions will get audited
- Audit Trail – Server Background Tasks: enable the auditing of the background tasks for Active Directory and Workflow Timeouts
- Audit Trail – current checkboxes include new events: understand that new actions have been added to existing audit trail groups
- Transmittal & Report – Quick Report Template settings: select templates to be used for Quick Reports
- Transmittal & Report – Date rendering setting is extended to Reports: enable the formatting of dates selected for Adept to apply to Transmittals
- User Circles – New: enable Circles to be activated
- Localization – New: select languages that can be used
- Troubleshooting – tracing of Cache and API events is new

LOGIN

The Login dialog in Adept has been modified to allow the user to show or hide login details that are not commonly changed.
• Language selection has been added to the Login dialog to allow the user to select in which language they would like to use Adept.

LOCALIZATION

Adept has been modified to allow users to operate Adept in languages other than English. All the text that ships with Adept, including menus, window titles, labels on dialogs, buttons, and messages are available in other languages. Adept 2015 initially ships with French Canadian as a language choice. Other languages will be made available based on customer demand.

Custom field names created by Administrators, which are used on library cards and as column headers, can be translated by using a translation module that is accessible from the Admin Menu. Customers may supply their own translation text for those items.

Other text that can be translated by the Administrators includes:

• Notification email message headers, footers, and subject lines
• Memo tab name
• Print Label strings
• FileGuide View names
• Library Card labels and tab names

Language to use can also be selected from the Options dialog. An Adept Administrator can dictate which languages, of the ones that are available, are acceptable to be used by users. Language selections made during log in or from the Options dialog are automatically remembered for the next log in.
• The Adept Viewer is also available in other languages.
• The default language that will be used the very first time Adept is installed is determined during the installation of Adept.
• The CAD integrations are localized and will use the same selected language as Adept.
• There are also new Date Display Formats available in this release. Administrators can set which format users will see.

New Date Display Formats are now supported.

The choices are:

• Adept Standard Format MM/DD/YYYY
• YYYY/MM/DD
• ISO UTC Format – ISO format in UTC (GMT time zone)
• ISO Local – ISO format in the user’s local time zone
• Windows – let the settings in the user’s Windows OS determine the format

INSTALLATION

Small changes have been made to the installation process to make it more efficient and useful.

• During the Adept Desktop installation process, the option to also update the Adept Viewer is now defaulted to YES. This will encourage administrators to update the viewer while they are logged into user computers with admin rights, which are required for installation.
• The installation instruction documents have been updated. Please read them before installing or upgrading to Adept 2015.
• It is possible to set the default language for an Adept user during the installation process.
• The Update Notes that you are currently reading are no longer displayed during the installation process. If you would like users to be able to read these notes, you will have to distribute them accordingly.
FILEGUIDE

Significant changes have been made to the FileGuide with this release. The 2 major improvements are the addition of the Favorites View and a cleanup of the Inbox.

- Favorites View

![Image of FileGuide with Favorites View]

The Favorites View in the FileGuide displays Saved Searches, Saved Lists and shows what Favorites are being Shared.

- Saved Searches – All searches saved by the user or shared to the user from another user are displayed here. To execute a saved search, just select it in the tree. The results show up on the right side listing in the FileGuide. The search criteria of a saved search are displayed in the FileGuide status bar.

- Saved Lists – All lists saved by the user or shared to the user from another user are displayed here. To see the list, just select it in the tree. The results show up on the right side listing in the FileGuide.

- <Last Search> – Selecting this item re-runs the last successful search and displays the results on the right side listing in the FileGuide.

- Sharing – Saved Searches and Lists that are displayed here are decorated with a hand if they have been shared to or by the user and/or a pencil if the user has given or been granted edit rights to the shared item.

- Managing Saved Lists – users have the ability to create new lists and name them, rename, delete, copy, and share them.

- Inbox – the Adept Inbox has been overhauled and cleaned up. Now, instead of listing all users and all the files pertaining to each user, the Inbox by default contains only the user inbox data, broken down into 3 sub folders.
The Inbox is less cluttered and displays only three subfolders: Assign, Out and Review.

- Assign – selecting this folder lists all the records that are directly assigned to this user
- Out – selecting this folder lists all the records that are signed out by this user
- Review – selecting this folder lists all the records that are reviewable by this user.

Users can add other users or Personal Groups of users to their Inbox. An administrator has the ability to override or reset a user’s inbox should they need to.

Users can add other users or Personal Groups of users to their Inbox.

Release Ownership and Undo Sign Out menu options are added to the right click menu of files listed in the Out folder under a user’s name in the Inbox.

- Custom FileGuide View names length has been increased from 240 characters to 900 characters. This limit is based on Oracle and MS SQL index length limitations.

**NOTIFICATIONS**

E-mail notifications have been extended to include more data and information about the files in reference.
The Send To feature sends a “floating” version of a document unless the user specifically sends a previous version of the file. This means that, a document referenced in an ALS attachment will retain its reference to the currently highest available version of that document if it was at the highest version when it was sent even if the version at send-time is no longer the highest version.

It is now possible to add Adept data names and values to the subject line of email notifications generated by Adept from workflow events, assignments, and alerts. It’s also possible now to include a column set of data about each file attached to the notification email in the body of the email.

Adept no longer offers to send an email notification to a user that is assigning a document to themselves. The action can still be recorded in the Audit trail, however.

CIRCLES

For companies with large numbers of Adept users, scrolling through long lists of users can be time consuming and error prone. The new concept of Circles in Adept is meant to help users shorten user lists throughout the product.

A Circle includes users that are in your library access groups AND are members of your Personal Groups.

Adept 2015 is the first incarnation of Circles in Adept and is limited in scope to a user’s Inbox and to Sharing.

A Circle can be thought of as a “circle of friends”. It is a compounded group of users that include users that:

- are users in library access groups in which the user is a member AND
- are members of any Personal Groups the user has created

The ability to use Circles can be enabled/disabled by an Admin in the Options Dialog. In that dialog, an Admin can run a Circle report to see how many users will fall into each user’s circle and make a determination if it is worth enabling the feature. It is recommended that customers with more than 50 users look into this feature for suitability and value.

AFS

Many improvements have been made to the AFS vault type and the actions involved in configuring and managing libraries in AFS vaults. There were several actions that could easily be performed on Direct vaults and FTP vaults, but not AFS vaults. With this release, many of those actions have been extended to work for AFS vaults.
• Move library can now be performed on libraries in AFS vaults. It is important to let all replication activities complete before moving the libraries. A new Replicate Now feature has been added to facilitate moving libraries in an AFS vault.

• Using an AFS vault with replication on or off no longer consumes a user license.

• The Replication Dashboard has new options that allow Admins to control the data that gets displayed by filtering files that have a Date-Time mismatch in all libraries and folders or just in libraries managed by Adept.

• A new option has been added to the Replication dashboard that allows admins to look at the logs from all the satellites.

• A new option under the server menu of the dashboard allows the user to generate a report that lists each satellite and each library in the entire system where replication is enabled. The matrix identifies, for each library, the satellites that it is replicated to. The library will be identified by library name and full library path. A "Y" and an "N" will indicate if the library is configured to be replicated to each satellite or not.

When executing this command, a window will be displayed which shows the report in a text format and can be exported to a tab delimited text file. The text file can be imported into Excel and results in desired columns of information, with library name listed vertically in Column A, library path listed in column B. Satellites are listed horizontally across the top in row 1. The user can easily sort this list to get all libraries that are not configured for replication to be grouped together.

• The performance of the feature that pushes date and time updates from satellite files has been improved by 20X.

AUDIT TRAIL

Many more actions and data points are now available in the audit trail to give administrators more insight into the details of file and data flow throughout Adept.

• The audit trail entries that track logins from users now indicates whether the user logged in from the Adept Desktop, Adept Explorer, or Adept Reviewer.

The audit trail tracks logins from each Adept Client. In this example, you can see the logins of users in Adept Explorer.

• The audit trail now reflects the new file name and the old file name when a rename action occurs.
• The Audit Trail Search results now contain a Filename field for every result record that involves a file.

• A new Admin menu Special Search option exists which will convert the Audit Trail search results that involve a file into a standard filename Search Result. This bridge between an audit trail search and a filename search will allow admins to take action on files found in the audit trail search.

A new Admin menu Special Search option exists which will convert the Audit Trail search results that involve a file into a standard filename Search Result.

• The audit trail search now has a cancel button if it appears the search is taking too long and you want to abort the search.

• The audit trail settings page in the Options dialog contains a new report that displays exactly what actions will be audited for each checkbox option.

• Many additional actions are now traceable from the audit trail. See the audit trail settings report for a complete list of what can be traced.

API

The Adept Desktop Application Programmer Interface (API) has over 40 additions and changes in this release mostly around access to the new features in this release or the changes that have been made to library management and configuration. A significant update to the API SDK accompanies this release with updated documentation of all API’s including full coverage and examples.

OTHER

There are many other new features in this release, big and small, based on direct feedback from customers.

• All system dates tracked by Adept are now stored as UTC date/time in the Adept database. This means that all file dates and Adept activity dates (sign in/out, workflow events, extraction, audit
trail, transmittals, etc.) are stored in the database using the Coordinated Universal Time standard. This equates to GMT with a standardized format. Whenever these dates and times are presented to the Adept user, they are converted to the user’s local date and time based on their Windows operating system time zone setting.

- Activate library set is now available in the right click menu of the library set dialog.
- The Adept installation guide has been updated to detail how to install multiple AFS satellites or hubs on one server.
- A new series of troubleshooting actions has been added to the Admin dialog for configuring Inboxes. These actions should not be used without the assistance of an Adept Helpdesk technician as the actions are permanent and can be significant.
- The Admin Login Report now accurately reflects how many users are currently logged in and reports separately on the number of Adept Desktop, Adept Explorer, and Adept Reviewer logins.
- The Property Window menu and dialog has been renamed as the User Library Access Rights Report.
- Because you can now add files to any number of named Favorite Lists, it is no longer possible or useful to display their listing in a Bold font.
- Save Search Subsets has been replaced by Save Named Favorites. You can now save named sets of files using the new save named Favorites feature.
- The option to Show All Files has been removed.
- In Adept there is a view called the Recently Used. It’s available via the Edit menu or by using F6. It displays an ordered list of the files the user has most recently interacted with. New to this release is a menu item to Clear the MRU list.

NEW FEATURES IN ADEPT DESKTOP CLIENT 2015 CAD INTEGRATIONS

The CAD integrations are enhanced in this release to improve ease-of-use, performance, and reporting.

Adept has increased performance with the CAD application in the Task Pane and a redesign reduces the potential for problems.

Mouse clicks can now be used to refresh, view, and open files more easily than before. The dialogs presented by the integration provide consistent access to all available options while simplifying usage. The ability to identify which files have been edited gives the user more information to make
better and more timely decisions about file versioning which can positively affect overall Adept performance. All property mappings between CAD and Adept can now be exported, allowing mapping reports to be easily saved and reviewed.

- The Adept Relationship Tree has been enhanced to indicate files that have changed from their previous versions. There will be an “X” on the colored circle icon indicating a changed file.
- The Adept integration will no longer load automatically in AutoCAD 2010 and 2011. If loaded manually, only the ribbon bar integration will be available (no Task Pane).
- A mapping report option is now available in the AutoCAD and MicroStation Plugin.
- The Adept Task Pane integration has been updated to support the enhancements made to handling Adept Libraries, Favorites, Sharing and the Inbox.
- All integration features have been updated to support Adept localization.
- The option to use Library Names or Library Folders is now utilized by the Adept Task Pane.
- The Adept Task Pane has been changed so as to only synchronize with Adept when the mouse is within the Task Pane area. This change prevents the Task Pane from stalling or crashing the CAD application when Adept is busy performing functions.
- In the Adept Task Pane’s Results area, a middle mouse button single click will engage dynamic scrolling of the results. A rapid double click will refresh the results similar to an F5 keystroke.
- The Adept Task Pane’s option to show only the specific CAD application’s files by extension has been enhanced to allow each extension to be specific separately with the new “Results Filtering…” option.
- A new Adept Task Pane option allows defining the action applied by a left mouse double click on a file in the Results area, similar to what is available in the Adept Desktop Client.
- The Sign In dialog can provide the option to discard (Undo Sign Out) unchanged children files, depending on whether the Adept administrator has enabled this option for all users. A similar command is available for “Undo Sign Out of Unchanged Children” outside of the Sign In dialog.

NEW FEATURES IN ADEPT WEB CLIENT 2015

Significant performance improvements exist in this version of the web client. Searching, paging, changing views and leaf selection in the FileGuide are consistently 4X faster than previous releases. There are new options for viewing files, administrating the web client, auto-login, append and refine search, and many of the new features from the Adept Desktop Client, like using shared saved searches and favorites lists.

- Email notifications from Adept include a link to the subject documents that take the user to the Adept Web Client. In the past, those links took the user to their Inbox. Now, those links take the user to the search results page listing the subject documents. It should be
What's New in Adept 2015

noted that all search results window functionality is available when arriving via a link with the following exceptions:

- Append and Refine is not available on the “Search Card” button
- “Search All Fields” is not functional for this list
- When changing the Information Source for this list the Search Card will not be automatically opened as it is after a normal search is processed.

- It is now possible to use 3rd party apps to view documents when using the Adept Web Client on an iPad. While Synergis Software has not specifically qualified any 3rd party viewing apps on an iPad, the ability to identify the file extensions of documents to be viewed on a 3rd party app has been added to the “web.config” file on the Adept Web Server. By default, file extensions that are inherently supported by the Safari browser on an iPad are already listed in the “web.config” file. To add a file extension, add a valid file extension, delimited by a comma to the following “web.config” entry:

```xml
<add key="MobileExtViewList" value=".pdf,.doc,.docx,.xls,.xlsx,.bmp,.gif,.jpg,.png,.tif,.pptx,.txt,.rtf,.csv"/>
```

- There have been extensive changes to the Admin page of the Adept Web Client. New or changed capabilities include:
  - It is now possible to identify file extensions that should be viewed by whatever desktop application the browser has associated with that file extension by listing those file extension on the Admin page of the Adept Web Client.
  - The ability to set the starting page that users land on after logging in. If the FileGuide is chosen, the starting View within the FileGuide can be set.
  - The ability to disallow downloading of files
  - Default Viewer Options

- The number to records to display per page of search results has been changed to show 100 records at a time by default. Also, there are new options to display 300 or 500 records per page.

- It is now possible to Append or Refine searches in the Adept Web Client.

- The library card is now movable and re-sizeable and the adjusted size is remembered and re-used the next time the library card is opened.

- The Adept Web Client user interface and web viewer is now available in languages other than English. This initial release of Adept includes French Canadian as the only other available language but other languages will be made available based on customer demand.

- Whenever a user needs to select a library on the search card, a library picker option is now available. The picker widget on the search card brings up a dialog window that allows the user to browse for and select a library.

- The installation instruction documents have been update. Please read them before installing or upgrading to Adept 2015.

- The way a new default column set is created and applied in the Adept Web Client has been updated. ADM can now create the default column set with a name of AdeptExplorer to be
available to all web client users. The web client first checks to see if the user has a "working" column set. If there is no working column set, then there is a check for the column set called AdeptExplorer. If it does exist, it applies the AdeptExplorer column set to a new working column set. If the AdeptExplorer default column set does not exist a standard default column set is created using Filename, Status, Library Name and Owner.

- There is a new Admin option that allows the admin to disable file downloads via the web client even though 3rd party viewing is enabled. Viewing files using a 3rd party viewer requires that the file gets downloaded to the user’s workstation and requires “copy” access rights. Files for viewing are downloaded to a temp folder on the workstation. The copy right allows the user to download files at will. This new option allows viewing while disabling the ability to download files at will.

- There are new viewer options in the Adept Web Client:
  o Adept Web Viewer
  o Local Viewer with Children
  o Local Viewer without Children
  o Use browser for formats it supports
  o Use direct vault access for files already in browser supported formats

- There are new auto login / single sign-on options for the Adept Web Client. See the Help documentation on the specifics of how to set this up. There are steps that must be taken in the Adept Desktop and IIS to enable this feature.

- There are several column set related improvements in this release of the web client including:
  o The ability to add multiple columns at once
  o Column set previewing
  o Availability of column sets shared by Adept Desktop users

- Sharing – any items shared by Adept Desktop users are available for use in the Adept Web Client. However, it is not possible at this time to share items from the web client. This means that saved and shared lists and searches will show up in the Favorites view of the web client FileGuide, but they cannot be edited or new ones created from the web client.

- A Library Picker utility is now available for use any time a user of the web client needs to identify a library, such as on the search card or library card. Picking a library in this way is more efficient and faster than building a list of all libraries and making it available in the library field dropdown list. When a library is picked from the library picker utility, that library name is added to the dropdown list for easy selection in the future.

- The file download capability has been expanded to allow multiple files to be downloaded unzipped. This means that the files will be placed in the destination folder as is with no need to unzip them before using them. This is configured by an option on the download dialog.

- The Inbox of the web client has been updated to match the changes to the Inbox of the desktop client.

- There is a new option that allows Adept Administrators to disable the Auto Login checkbox on the log in dialog thereby forcing users to enter their credentials.

- Now, when a user redlines a document in the Adept Web Viewer, the name of the user making the redlines is displayed instead of “anonymous”.

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WHAT’S NEW IN THE ADEPT 2015 SP1 (VERSION 10.0.1)

Adept 2015 SP1 includes updates to the Adept Desktop Client and the Adept Server. The Adept Web Client and Adept Viewer remain unchanged from the Adept 2015 version.

NEW FEATURES IN ADEPT SERVER 2015 SP1

THE DESIGNER MODULE

The Designer module has undergone some improvements to facilitate clarity during upgrades.

- Adept Designer menu has been made clearer regarding selection of the appropriate upgrade option.
  - When the upgrade has completed, a message about using the Adept Licensing Tool to validate your server name has been added.
- Designer New and Upgrade now include the new Adept Relationship Search Plugin.
  - Due to the 10 GB database size limitation of Microsoft SQL Server Express, should the upgrade of the Adept database exceed this limitation, a message will be displayed informing of this limitation. The Adept upgrade documentation contains instructions on resolving this condition and completing a successful upgrade.

OTHER CHANGES

Adept supports Oracle’s recommended Unicode character set AL32UTF8. Adept also supports non-Unicode character sets such as WE8MSWIN1252. No other Unicode character sets are supported by Adept.

NEW FEATURES IN ADEPT DESKTOP CLIENT 2015 SP1

The Adept Desktop Client has significant improvements while adding integrations for newer versions of CAD applications.

AUTODESK 2016 SUPPORT

Adept 2015 SP1 introduces integration support for Autodesk 2016 products. Support includes extraction of pertinent information from the CAD files as well as “in the window” integration within the CAD application, which includes the Adept Relationship Tree, Adept right-click options, and the Adept Task Pane.

- AutoCAD
- AutoCAD Mechanical
- AutoCAD Electrical
- Autodesk Inventor and Inventor Professional
- Navisworks Manage and Navisworks Simulate

The integrations have also been enhanced to support most of the new features of the CAD applications. For example, Inventor’s ability to import reference models and to link to an associative DWG file are supported by Adept’s ability to extract and manage these external references. Before using any new feature in any supported CAD application, please review the Adept documentation and help files for specifics on how to use that feature with Adept.
VIEWING SUPPORT FOR AUTODESK 2016 PRODUCTS

Please note that the Adept Viewer provided with Adept 2015 SP1 is the same version of the viewer provided with Adept 2015. There is no viewing support for Inventor 2016 format files. AutoCAD, AutoCAD Mechanical, and AutoCAD Electrical continue to save to AutoCAD 2013 DWG format. The Adept Viewer does support viewing of AutoCAD 2013 DWG format files although there may be objects in these files from newer versions of these products that the viewer may not support. All Navisworks files continue to be supported for viewing only by using the Navisworks Freedom viewer in Adept.

INVENTOR 2013 INTEGRATION REMOVED

The Adept integration for Autodesk Inventor 2013 and Inventor Professional 2013 has been removed and is no longer available. Autodesk Inventor 2013 format files continue to be supported for extraction.

DATABASE ACCESS PERFORMANCE IMPROVEMENTS

A specific effort was made to improve database access performance and the results are significant. When performing the common commands of Sign Out, Sign In, Approve, and Copy, Adept 2015 SP1 has demonstrated improvements from 6% to 28% faster when compared to Adept 2015 using those common commands. Adept 2015 SP1 has demonstrated improvements from 16% to 45% faster when compared to Adept 2014 SP3 for using those same common commands. These results were shown when using a 100 file set a 500 file set. When operating on larger sets of files, the improvement could be even greater. These improvements will reduce the time to complete some commands by several minutes.

NEW RELATIONSHIP SEARCH PLUGIN

A new standard Adept Plugin is available called the Relationship Search Plugin. This feature allows for the selection of a file and subsequent searching for all children or all parents of that file at all levels. Options are provided to send the list of files to the Adept Search Results window, to an Adept Favorites list, or to print or export the files list to a multitude of formats.

AUTONAME PLUGIN

The ability to use the AutoName feature is now available in the Adept Rename and Copy command dialogs.
Adept 2015 SP2 includes updates to the Adept Desktop Client and the Adept Server. The Adept Web Client and Adept Viewer have also changed from the Adept 2015 version.

**NEW FEATURES IN ADEPT DESKTOP CLIENT 2015 SP2**

**QUALIFIED IN WINDOWS 10 X32/64**

Adept 2015 Desktop Client, Adept PublishWave 2015 Server, and Adept Web Client (with browser limitations) are now tested, qualified, and supported on the Windows 10 operating system 32-bit and 64-bit editions (PublishWave Server only on Windows 10 64-bit edition). The Adept 2015 SP2 System Requirements will reflect this qualification and note any restrictions and limitations. Any 2015 version of Adept products (SP0, SP1, and SP2) are supported on Windows 10, not just SP2.

Please note that the Adept CAD integrations and Adept PublishWave support for Windows 10 X32/64 is limited to those CAD applications with support for Windows 10 (of which there are only a few at this time). A customer upgrading to Windows 10 and using Adept 2015 must ensure that their CAD application also supports Windows 10 or Adept’s integration/usage cannot be supported.

**MULTI-SEARCH RESULTS ACCESS**

The Search results Window now provides a tree pane on the left side similar to the tree panes available in the FileGuide and Work Area windows.

The SR tree retains previous searches and lists and provides access to these tree entries by selecting them. Tree search entries are live, so selecting a search leaf results in the document pane being refreshed using the search criteria used in that pane. Tree lists are static regarding the list of documents but the metadata is live, so selecting a list leaf results in the document pane being refreshed with the same document list but with updated metadata, if needed.

Retention of search and list leaves are controlled by the user in the Edit >> Options >> User Display settings. Acceptable values are from 1 to 20, inclusive.
ADEPT PLUGIN FOR PDF EXTRACTION

The Adept PlugIn for PDF Thumbnails has been enhanced to include the extraction of PDF form field and file property information into Adept data fields. This is a frequently requested enhancement to Adept’s capabilities for extraction of valuable information from PDF files.

Additionally, this plugin will be used to perform any text extraction needed by FTS. The extracted text using this PlugIn is significantly better quality than the text currently extracted by the Adept viewer.

ADEPT PLUGIN FOR ALTERNATE VIEWERS

A new PlugIn is included which is designed to make it easier for Adept Administrators and users to configure Adept to offer usage of alternate third party viewers. Administrators can configure the PlugIn and provide the settings file to users, or each user can configure the PlugIn themselves.

Either way, users can have Adept prompt when executing a View File command...
... Or, have Adept use the configured viewer without prompting. Using this Plugin allows users to simply select the “View File” command from any location (toolbar, right-click menu, etc.) and have the desired viewer used, all without using File Types or the Unrestricted Launch selection. It is expected that usage of this Plugin will be more readily understood and more easily accessible by users.

**SOLIDWORKS 2016**

Adept 2015 SP2 introduces integration support for SOLIDWORKS 2016 (except Adept Viewer support). Support includes extraction of file properties, configurations, sheets, relationships, and thumbnail information from the CAD files. It also supports “in the window” integration within the CAD application, which includes the Adept Relationship Tree, Adept right-click options, and the Adept Task Pane.
WHAT'S NEW IN THE ADEPT 2015 SP3 (VERSION 10.0.3)

Adept 2015 SP3 includes updates to the Adept Desktop Client, the Adept Web Client, The Adept Viewer, and the Adept Server. There are no changes to Adept PublishWave with this release.

NEW FEATURES IN ADEPT DESKTOP CLIENT 2015 SP3

ADEPT VIEWER

The Adept Viewer has been updated to the latest AutoVue version (v21.0.0.1). This version of the Adept Viewer adds viewing support for Inventor 2015, Inventor 2016, SOLIDWORKS 2015 and SOLIDWORKS 2016 (except viewing .SLDDRW for 2016) format files in addition to de-supporting several file formats and resolving several critical issues reported by customers. The Adept Viewer is updated for both the Adept Desktop Client and for the Adept Web Client (Explorer and Reviewer).

PERFORMANCE IMPROVEMENTS

Performance improvements have been made that improve usage of the Adept Search Card, completing a search, switching leaves in the Search Results Tree, and batch printing with the Adept Viewer.

NEW FEATURES IN ADEPT WEB CLIENT 2015 SP2

ADEPT VIEWER

The Adept Viewer has been updated to the latest AutoVue version (v21.0.0.1). This version of the Adept Viewer adds viewing support for Inventor 2015, Inventor 2016, SOLIDWORKS 2015 and SOLIDWORKS 2016 (except viewing .SLDDRW for 2016) format files in addition to de-supporting several file formats and resolving several critical issues reported by customers. The Adept Viewer is updated for both the Adept Desktop Client and for the Adept Web Client (Explorer and Reviewer).
WHAT’S NEW IN THE ADEPT 2015 SP4 (VERSION 10.0.4)

Adept 2015 SP4 includes updates to the Adept Desktop Client, the Adept Web Client, The Adept Viewer, and the Adept Server. There are no changes to Adept PublishWave with this release.

NEW FEATURES IN ADEPT DESKTOP CLIENT 2015 SP4

ADEPT VIEWER

The Adept Viewer included in Adept Desktop Client 2015 SP4 is the combination of the Adept Viewer as provided with SP3 plus the Adept Viewer patch released after the release of SP3. There are no fixes or enhancements to the Adept Viewer with this release other than those already provided with the SP3 viewer patch.

DATA IMPORTER

The Adept Data Importer Plugin has been enhanced to support the creation of a search results using the imported spreadsheet information. For example, this change makes it very easy to generate a search results in Adept from a list of filenames contained in a spreadsheet.

WORKFLOW SHARING

Workflows are now included in the Share Manager. Workflows need not be shared with users for them to participate in a workflow. For a user to see a workflow in the list of available workflows, such as when rerouting a document to another workflow, the workflow must be shared with that user. Sharing workflows can eliminate the possibility for a user to reroute a document to an incorrect workflow as the user will only see workflows shared with them.

TRANSFER OWNERSHIP

All shared items can now have their ownership changed by using the Transfer Ownership capability within the Share Manager dialog. As the author of an item (favorite list, column set, etc.), the creator is automatically the owner.

NEW FEATURES IN ADEPT WEB CLIENT 2015 SP4

ADEPT VIEWER

The Adept Viewer included in Adept Web Client 2015 SP4 is the combination of the Adept Viewer as provided with SP3 plus the Adept Viewer patch released after the release of SP3. There are no fixes or enhancements to the Adept Viewer with this release other than those already provided with the SP3 viewer patch.