

# What's New

in Graitec Opentree 2022.2

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## **Welcome to Opentree 2022.2**

GRAITEC is very pleased to present the latest version of the leading document management software - Opentree 2022.2, part of the Graitec Advance suite.

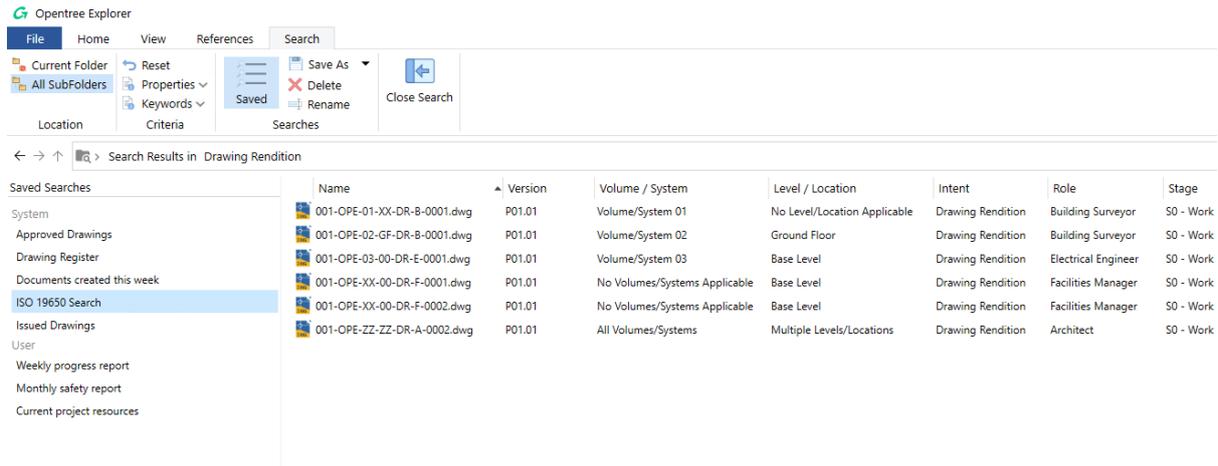
GRAITEC has continuously strived to provide first-rate advancements for innovative software solutions to its valued customers, and the recent launch of its new and upgraded product range for 2022 is no exception, proving they are still top of their game in terms of providing top-level Construction, AEC, and Building Design software solutions worldwide.



This point release is focused not only on delivering new functionality, but also on enhancing existing functionality to deliver a more complete solution. At the same time delivering a much-improved user experience when submitting documents for review, along with a host of product enhancing updates.

This document aims to highlight those updates and introduce you to Opentree 2022.2.

## Saved System Searches

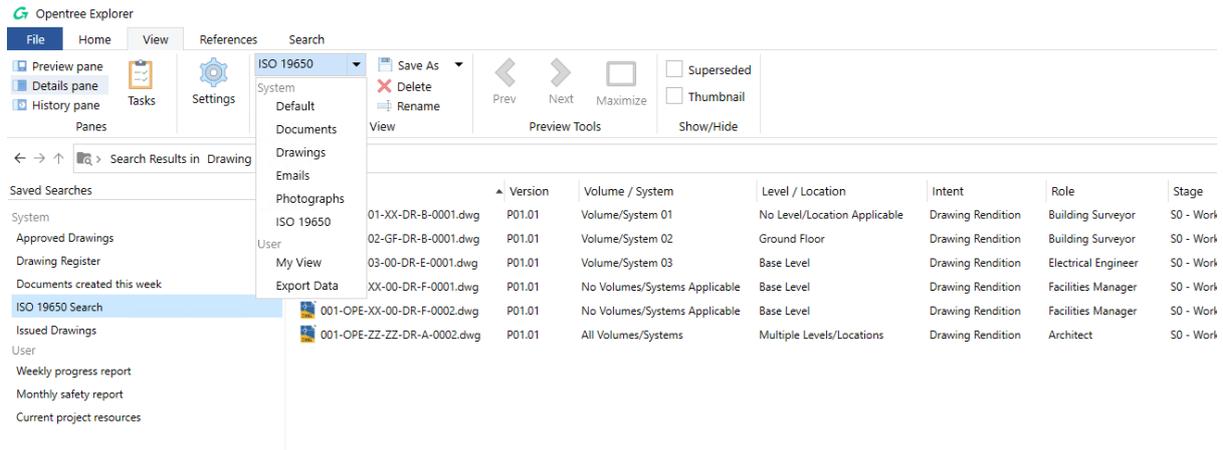


Opentree 2022.2 expands upon the existing functionality of being able to save your searches, by delivering the option to save your searches as system searches\*. System searches, unlike your saved searches, are available to all users of Opentree.

This allows a customer to create a collection of preconfigured searches available to all their users, helping them to locate their documents easily and quickly.

\* A user needs the Manage System right to create, edit and delete saved system searches. To create a system search, simply drag and drop a saved user search into the list of saved system searches.

## Saved System Views



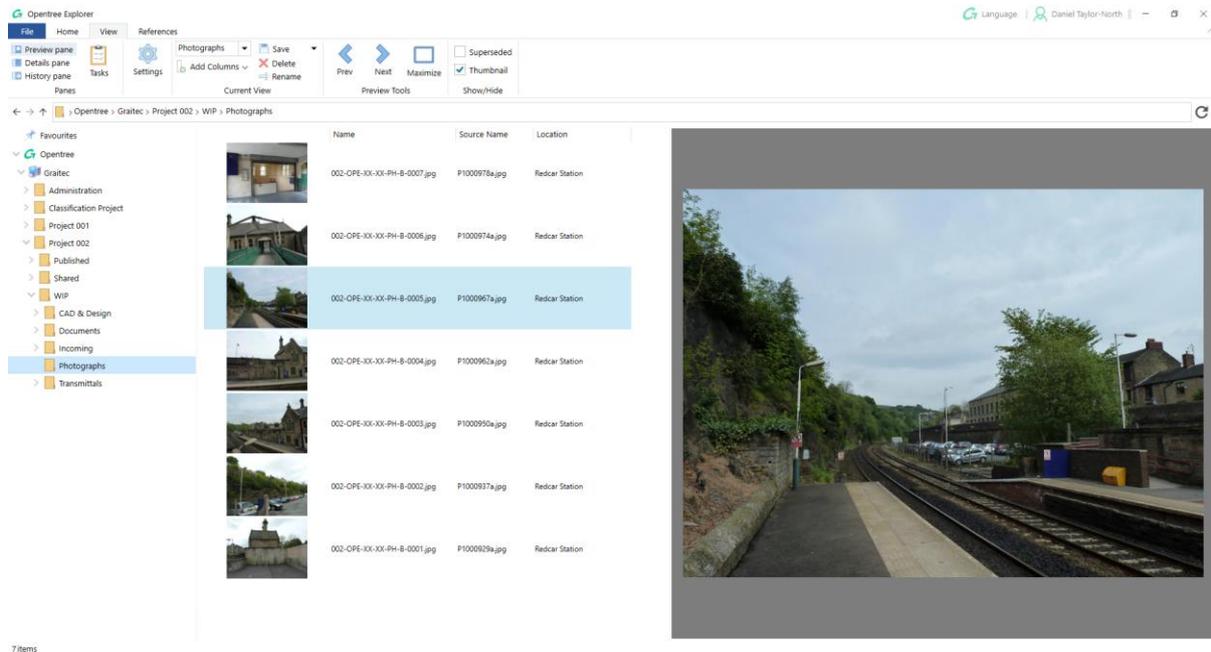
Opentree 2022.2 expands upon the existing functionality of being able to save your views, by delivering the option to save your views as system views\*. System views, unlike your saved views, are available to all Opentree users.

This allows a customer to create a collection of preconfigured views available to all their users, helping them to select the relevant metadata easily and quickly to be displayed alongside their documents.

\* A user needs the Manage System right to create, edit and delete saved system views. To create a system view, simply drag and drop a saved user view into the list of saved system views.

Note: Although the Default saved system view cannot be deleted, it can be edited.

# Thumbnails

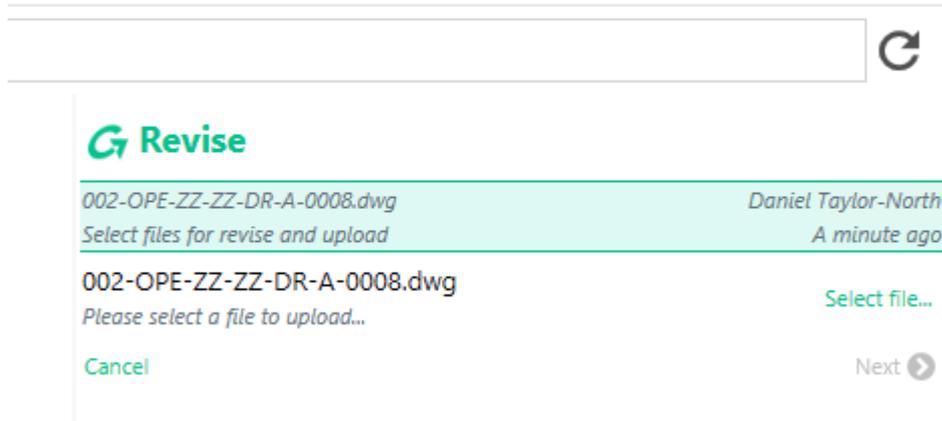


Opentree 2022.2 delivers the option to display thumbnails alongside each document. This option is in the Show/Hide section of the View tab\*.

Thumbnails are automatically created on document creation and updated when the document is edited and checked in.

\* This user setting is per folder and is set to hide by default. Once set to show, thumbnails will remain displayed for the chosen folder until the user decides to hide them.

## Revise (provide revised file)



Opentree 2022.2 allows a user to revise a document with a file on their local PC or network\*.

This functionality is often used by customers who receive revisions of documents and drawings from a third party and wish to maintain a revision history of the documents they have received.

\* As this is a configurable option, the revise workflow task needs to be configured to prompt the user to provide a file.

**Review (provide PDF to be reviewed)**



** Send For Checking**

<i>002-OPE-ZZ-ZZ-DR-A-0008.dwg</i>	<i>Daniel Taylor-North</i>
<i>Optional : Upload files to be reviewed</i>	<i>Just now</i>

002-OPE-ZZ-ZZ-DR-A-0008.dwg Select file...

*Please select a file to upload...*

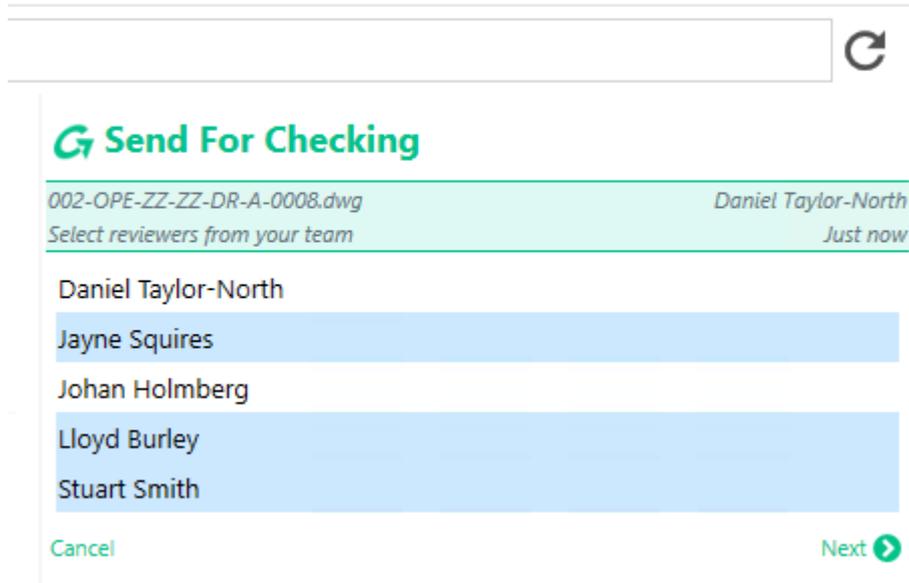
CancelNext 

Opentree 2022.2 enables a user to provide a PDF to be reviewed from their local PC or network\*.

This functionality is often used by customers who require wet signatures and therefore wish to provide a scanned PDF of a document to be reviewed.

\* As this is a configurable option, the review workflow task needs to be configured to prompt the user to provide a PDF. There are 2 options, "Allow PDF Upload" and "Require PDF Upload".

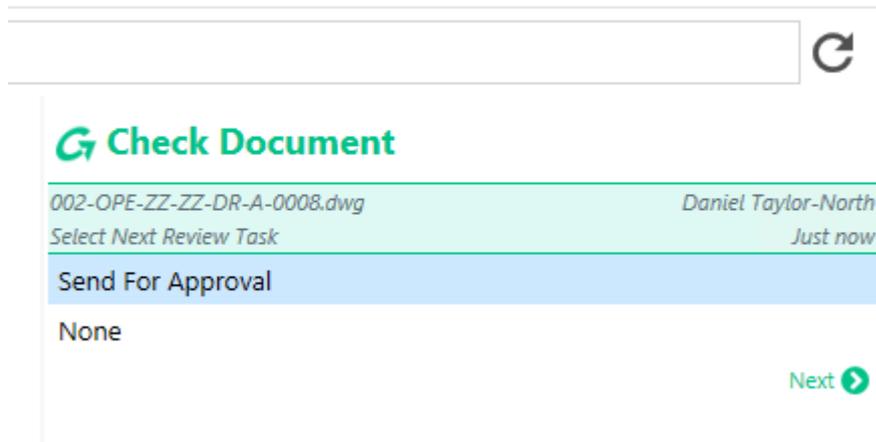
## Review (select multiple reviewers)



In Opentree 2022.2, when sending a document for review, the user can select multiple reviewers. This works on a first come first served basis, therefore the first reviewer to accept/reject the document automatically removes the review task from the other recipients' task panes.

This functionality is often used to ensure that the approval of a document does not get delayed due to a reviewer being unavailable or on annual leave, as multiple reviewers are made aware of the document to be reviewed.

## Review (check and send for approval)

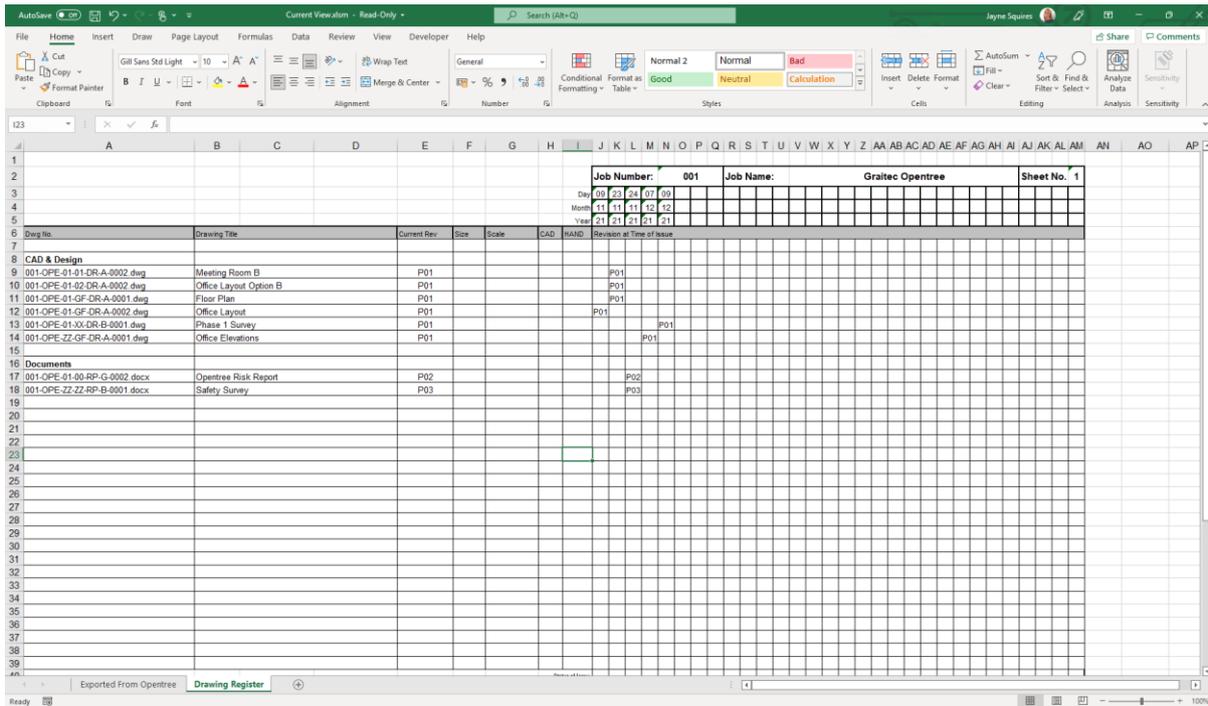


In Opentree 2022.2, completing a review task will automatically prompt the user to start a subsequent review task\*. For example, after checking a document a user may be prompted to send the document for approval.

Workflows are highly configurable, so not all review tasks will have a subsequent review task. However, it is also possible to have multiple subsequent review tasks. In this case, the user is prompted to select from a list of review tasks. For example, "Send for Approval <= £5000" and "Send for Approval > £5000".

\* The user must have the right to perform the subsequent review task to be prompted.

## Export Current View to XLSM



Opentree 2022.2 supports the export of the CAD current view to a macro-enabled Excel file. This allows us to customize the XLSM template to include a custom sheet and macro\*.

On export of the current view, the listed metadata is exported into a data sheet, which can then be read and formatted by a macro to produce a document register or an issue sheet for example.

\* Currently Opentree only supports one XLSM template, so if you wish to produce more than one output, we may need to develop a custom set of macros to achieve this.

## **Rename**

**G Rename**

<i>South Elvation.docx</i>	<i>Daniel Taylor-North</i>
<i>Please wait</i>	<i>A minute ago</i>

*Numbering Components*

South Elevation

*Result*

<b>Filename</b>	<i>South Elevation.docx</i>
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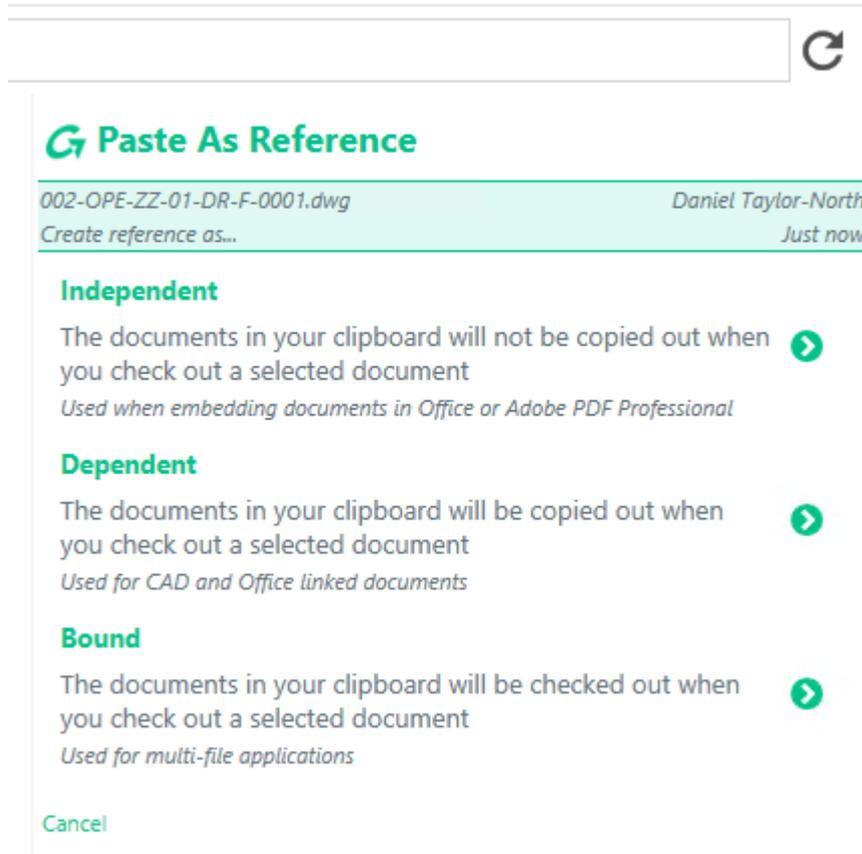
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Opentree 2022.2 provides the user with the ability to rename documents which were created with a free type filename\*.

This functionality is often used by customers who receive documents and drawings from a third party and import them with their given filename, only to realize later that they are misnamed or misspelt.

\* A free type filename is a filename which has been free typed and not automatically generated by Opentree's automated file naming functionality.

## Paste As Reference



In Opentree 2022.2, users can copy one or more documents and paste them as references to one or more other documents. The result of which is the creation of a reference record between the chosen documents.

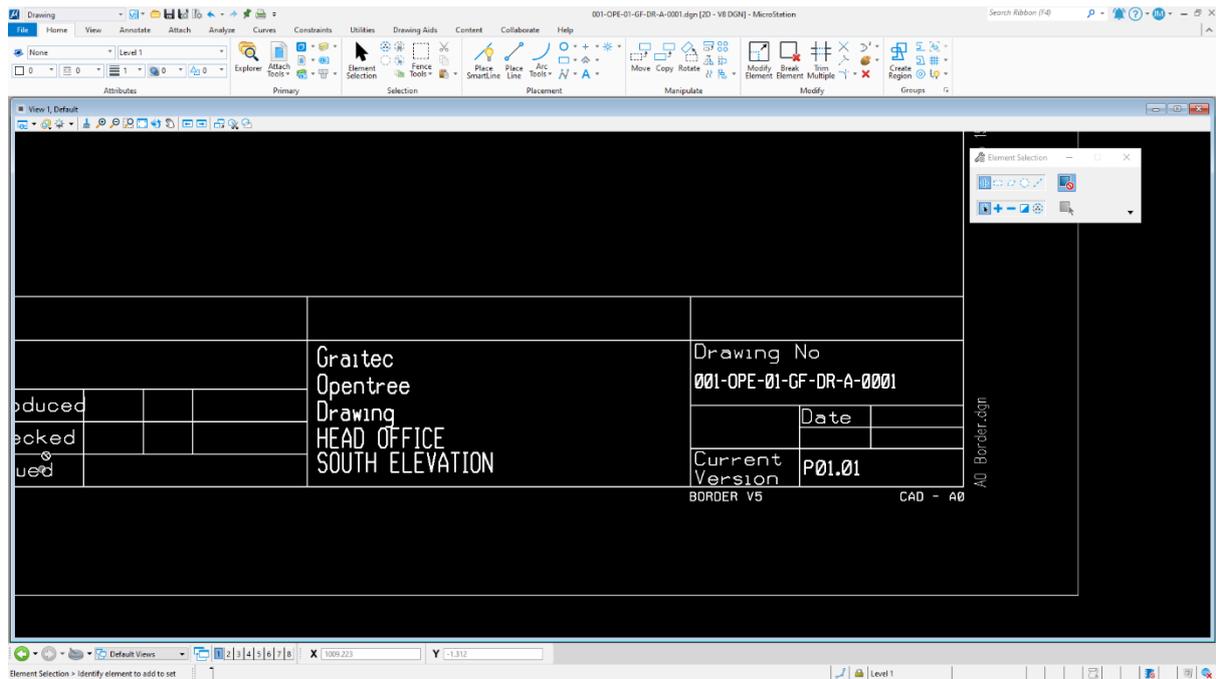
There are several reasons why a customer may wish to create a reference between two documents, therefore we provide the user with three different types of references to choose from when performing the task. These are: Independent, Dependent and Bound.

Independent references are not required to be copied out on open of a document, they simply enable the user to create a reference between two documents. For example, a report is made up of multiple live documents (i.e., appendices), using this option will allow other users to identify the documents used in the creation of the report.

Dependent references are required to be copied out on open of a document, as they contain data which is required by the document being opened. For example, a drawing sheet which references a model and/or an image; without these documents the drawing sheet would be an empty title block.

Bound references are required to be copied and checked out on open of a document, as they contain editable data which is required by the document being opened. For example, a CAD model which has associated files which must be in an editable state.

## MicroStation DGN Support

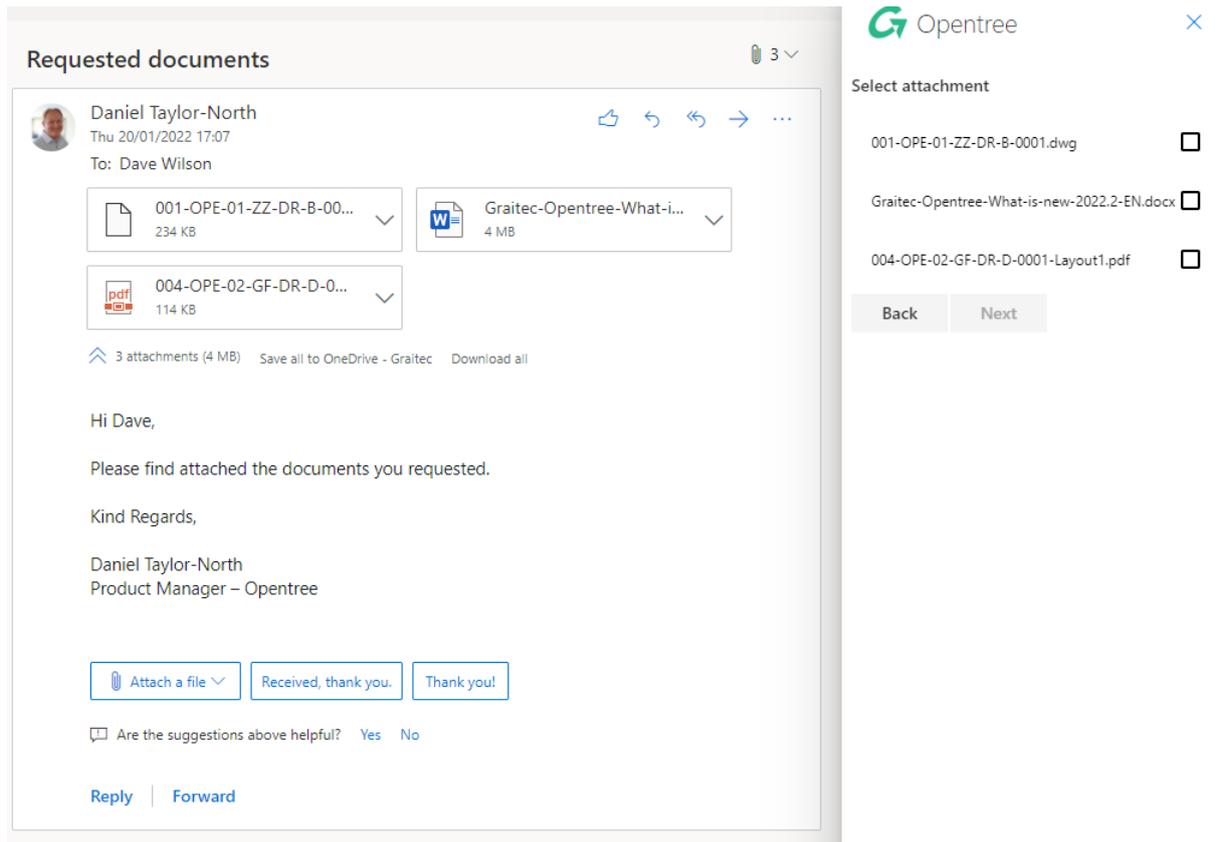


Opentree 2022.2 supports MicroStation DGN files in the same manner as Opentree supports AutoCAD DWG files. This includes linked text (IDL) and reference management.

The linked text functionality makes use of MicroStation's tag sets and tags, equivalent to AutoCAD's blocks and attributes. These are populated on document creation, check out/in, review and so on.

The reference management functionality makes use of MicroStation's references, equivalent to AutoCAD's Xrefs. These are managed on check out/in, review and so on.

## Import Email Attachments



The Outlook Add-in delivered with Opentree 2022.2 allows for the import of attachments.

When importing an email which has attachments, the user is prompted as to whether they wish to import the email or the attachments. On selecting attachments, the user is provided with a list of the attachments so they can choose which of them they wish to import. They are then provided with a list of valid folders and intents which have been configured to allow for the import of email attachments\*.

\* To limit the list of folders and intents, the Outlook Add-in looks for intents which have all the file types you are attempting to import (e.g., a DOCX, a PDF and a DWG), plus the email extension EML.

## **Minor & Configuration Updates**

Opentree 2022.2 also delivers a couple of minor updates, as well as updates to how the software can be configured.

The first minor update is the inclusion of the sender's comment in the email notification sent to the reviewer. The second minor update is that copy out opens a Microsoft File Explorer window navigated to the copied out file(s) on the user's PC\*.

The first configuration update is that folder keywords can contribute to a document's filename. This enables customers to apply a keyword value at a folder level, which contributes to all document filenames created under that folder structure. This will help simplify a customer's configuration where their folder and intent structure does not easily translate into their document naming convention.

The second configuration change is that the application into which a document is opened can be managed by providing a Windows registry key name against an application configured in Opentree. For example, this enables Opentree to ensure that a Revit 2020 project is opened in Revit 2020 and not Revit 2022.

The final configuration change is that when creating a document, a user can be given the option to set the documents revision regardless of whether the naming convention contains a revision field. For example, when importing a document, the user may wish to set the document's revision to "C", but they do not want the revision to appear in the filename.

\* If copying out a selection of files from a search where the files exist in different folders, copy out opens a Microsoft File Explorer window navigated to the folder of the first selected document.