

12d Synergy V4 – Release Notes

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V4 contains a large number of features. Many of these features are listed in this document, but this list may not be exhaustive.

This document also contains pre-requisites and instructions for upgrades.

Prerequisites

Upgrade Path

You cannot upgrade from V2 directly to V4. You must upgrade via V3. Please upgrade to v3 first. Ensure that you check the V4 Requirements Document first, as the requirements have changed.

Check Outs

You must make sure that there are no files, managed folders or 12d model projects checked out before beginning this upgrade, or you may experience some data loss.

You can determine what is checked out by running a search using the System View.

Scripts

Due to changes introduced in v4, Scripted Reports, Tasks and Events may need to be recompiled before they can be used. If these were supplied by 12d Solutions, please contact them at the Support Portal or on support@12dsynergy.com

Workspaces

V4 uses a new mechanism to remove the variable numbering in the workspace. As a result, workspaces will be downloaded again (as necessary). If you do not intend to use V3 alongside V4, then you may wish to consider removing the old workspaces from your computers before upgrading.

12d Synergy Variables and Attributes

Due to the new powerful 12d Synergy Expression, all templates, dashboard and so on can now use variables within { }. Previously, variables were denoted with a single \$.

12d Synergy will still honour the old \$ variable format, but the editors will not display them in most cases to encourage the use of the new braces system.

Upgrade Process

Server Upgrade

1. Stop the 12d Synergy Server Service
2. Uninstall the 12d Synergy Server service from Programs and Features
3. Run the upgrader that was supplied for you or downloaded from <http://www.12dsynergy.com/downloads>
4. When prompted, fill out any questions required
5. Check the Windows Event Viewer or your file logs for any errors after the server comes back up
6. Due to necessary changes, any scripted reports, tasks or events may need to be recompiled and updated via the 12d Synergy Administrator before you can use them. If these were provided by 12d Solutions, please contact support via the Support Portal or support@12dsynergy.com
7. If your firewall settings for V3 were set up using a program path rather than port exceptions, make sure you add the new executable to your firewall rules.

Client Upgrade

Upgrading Manually

You can choose to manually upgrade all the client software on each machine, using your own install script or by hand. Note that this will not clear out workspaces, as per the pre-requisites above.

Upgrading via the Auto Upgrader

It is possible to fully upgrade all user computers by using the Auto Upgrader, however you must upgrade your administrator first so they can set the auto upgrader.

Once they are upgraded, simply open the 12d Synergy Administrator and go to: System Settings->Auto Upgrader

Here, you can specify the executables to use for the upgrade.

Note that this will not clear out workspaces, as per the pre-requisites above.

Running V3 and V4 Side by Side

It is possible to run V3 and V4 side by side under certain conditions.

1. Only the CAD and Office Plugins from the last version to be installed
For example, if you want to use the V4 plugins, you must install V4 last.
If you want to use the V3 plugins, you must install V3 last.
2. If you wish to use the V3 and V4 plugin for 12d model, you must use the relevant 12d Synergy Client version to open the project in question.

What's New in V4

Major Features

See below for more details on each specific feature.

- New CAD Features
- Workflow Engine
- Mapping and Spatial Search
- Reporting Engine

CAD

- Automatic plugin installation
- Bulk reference manager
- Support for Sheet Set Manager
- Work with DWG Layouts and attributes
- Support for Point Cloud, Images, Data Links reference types
- Support for AutoCAD 2018, 2019
- Support for BricsCAD
- Support for Civil3D and data shortcuts
- Support for AutoCAD Map, Mechanical, Plant3D, Architecture
- Now providing a ribbon and menu bar

Workflow Engine

- Administrators can now define workflows for List attributes
- Administrators can upload custom workflow activities and conditionals
- Administrators can define triggers using workflow activities in response to operations such as adding a new file

Mapping and Spatial Search

- Display maps alongside Jobs, Contacts and Companies
- Address geocoding provided
- Search for jobs based on their relative or specific location
- Search for files based on their relative or specific location

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- Display KML or shape files directly on your job maps

Reporting Engine

- New out of the box reports, including license reporting
- New dashboard gadgets
- New report scheduler

12d Model

- Offlining of 12d model projects now available without checkout
- Offlined projects can not be checked in by accident
- Can now select an Environment File for use with 12d View
- Added ability to check in many 12d model projects at once
- Automatically set environment variable hook to use correct plugin when opening from the client
- Added a user definable ignore list for files and folders
- Added 12d model project templates
- Cached customisation mode to auto get customisation at open time
- Default to checking out 12d model projects unless instructed otherwise
- 12d View no longer requires an ADM license
- 12d Model Browser now remembers column settings
- Export of 12d Model projects without offlining
- 12d Model project data can be zipped before uploading

General

- Column layouts for searching can now be defined
- New layouts for editors
- Allow manual definition of subnet for differentiation between local and remote connections
- Allow export of individual folders from the server instead of whole jobs
- Search by folder path
- Support auto expiry of published packages and files
- Added a bulk attribute editor for jobs, files, contacts and companies
- Added capability to preload server connection details via an XML file
- Added capability to support different workspace paths based on your server
- More attributes included in web file drop templates
- File browser now shows locally saved searches for easy access to search data

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- Added ability to search by file size and version
- Added network health icon to client to show connection speed
- Added File Launchers to allow users to define how to open different file types
- List attributes now allow key entry to enter the values
- Show recent folders in folder browser
- Previous history now available from check in window
- F2 now starts a rename operation
- Added a recent items list to show recent files, folders, and 12d model projects
- Preview Viewer now shows when a preview is still waiting to be generated
- Support adding multiple associations at one time
- Now tracking notifications sent from notes
- Remembers which tab was last used in the active items window
- Files browser now has a recent files popup
- Now letting user choose which window to use when opening from a 12d Synergy Link
- Open from Link button added to recent jobs screen
- Option to send a publishing link manually via email
- Auto detect reference locations when multiple referenced files are loaded at the same time
- Publish from a user email address instead of the system address
- Dashboard now shows all checked out items instead of just files
- More progress information when uploading data
- Add Files button now shows recently used files in Windows
- Double click to go to associated entities
- Added request check in for managed folders
- Column added for File Created / Last Modified Date when looking at files
- Can now search for files by the last change type
- Easier access to old versions of files inside managed folders and 12d model projects
- Better options for handling changed files when doing a Get All
- New UI for targeting contacts from check in messages, using the @ symbol
- Managed folders and bulk uploads can now be zipped before uploading

Administration

- Warning when disk space is low
- Ability to disconnect a user
- Import and Export of data packages

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- New expression builder tool for dashboards and email templates
- Added license pools for reporting and management purposes
- Filter connected users by license type and pool
- Easier to connect users and groups
- Subscribe groups to a specific FRS
- Support local and remote FRS connections
- Send out invitation emails when users are created
- Default temp path is now the installed as the Files path – new installs only
- Showing a banner in the administrator when server errors are detected
- Performing health checks and logging to the file logs
- Personal Job Creation is more user friendly
- File Stores and Servers can now be removed
- Attribute selector now allows sorting
- Password requirements for web file drops and publishing
- Added tool to help explain permissions
- Ability to delete event scripts
- Permissions can now be pushed from templates
- Forbid new contact creation if it already exists
- 12d Synergy Client can now copy and paste files
- File list now shows the number of files selected
- Can now insert files from 12d Synergy into word documents
- Push folder layouts from templates
- Auto updater can now use a file already in 12d Synergy
- Auto updater now supports optional updates
- More info in the search results for users in the administrators
- More statistics added to the general pane
- Better logging of client connections
- Copying now prompts for rename or replace if the file already exists
- Option to always prompt for login, to allow login as a different user

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Optimisation

- Faster evaluation of permissions
- Delayed previewing and indexing
- Database insertion happens after uploads instead of before
- Faster Move and Copy File operations
- Speed improvements to indexing data in bulk
- Delta processing happens much less regularly to reduce strain on database
- FRS now zips index data before sending it to the master server
- Reduced unnecessary repeated calls from the client to the server
- Opening from a link is now much faster

Issuing

- Pick a publishing template when issuing
- Filter sets with a search box
- Can now move issue sets between issue types in the same job
- Can now delete issue sets
- Can now delete issue set types
- Added option to send a transmittal cover sheet with an issue
- Define transmittal sheet on a global and per job basis
- Added ability to create a link for an issue set
- Description now visible in the general list
- Issue from a user email address rather than the system address

Reference Tracking

- Display a reference graph to show all references
- References now track versions to allow version specific rollbacks
- Bulk Uploads can now find references automatically instead of requiring a manual step

Connectors

- Engine Optimization
- Added a Total Synergy Connector
- Reduced default connector frequency

Naming Rules

- Consolidated naming rule and attribute data entry for file uploads
- Added zero padding
- Document type counters based on attribute combinations
- Can now move files to a target with a naming rule in place
- File naming rules can now be inherited down from a parent folder

Sync Tool

- Sync tool can now sync sub folders rather than just top level folders
- Added a quick 'sync' option for sync tool users
- Sync Tool support for machine groups and names
- Can now see what pending transfers are available
- Combined multiple transfers into one window

Contacts and Companies

- Allow deactivation of companies
- Added button to hide inactive contacts in the Contacts editor
- More information shown in the companies window when looking at staff
- Showing companies when looking at the Contacts Window
- Show recent contacts in contacts browser
- Added contact lists for quick reuse of contacts
- Added a quick search with auto completion in the companies and contacts browser
- Contact images are now cached locally
- Contact window now shows if the contact is a user or not

Office Plugins

- Can now open a job directly from the drop zone in outlook
- Added a bulk uploader for emails
- Relaxed the default outlook settings
- Added a button to turn the outlook plugin on and off

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- Emails now uploaded with a meaningful name
- Can now create a folder when saving attachments
- Outlook can now use manual email templates
- Ability to upload and auto delete emails in outlook
- Added option to only show sub folder names in the drop zone
- Outlook no longer counts inline images in the attachment count
- Supporting multiple email stamps

Command Line and API

- Created a client side API
- List command can now accept a depth
- Added server side script events for 12d model project creation and deletion
- Better date controls available for scripted inputs
- New script input to capture many attribute values