

# Opentree 2022 Client Starting Guide



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## 1. Introduction

Graitec Opentree are solution providers who develop a world-class document management software system for Architects, Engineers and companies requiring compliant workflows. Above all, our goal is to make document management easier and to reduce unnecessary manual processes.

## 2. Installing Graitec Opentree

The following section provides system requirements and installation steps for Opentree Client and Opentree Revit Add-in.

### 2.1. Opentree Client Installation

The following section provides installation steps for Opentree Client.

#### Install

1. Run Graitec.Opentree.Desktop.Setup.msi
2. In Graitec Opentree Setup Dialogue > Click Next
3. Review the license contract > Click I accept > Click Next
4. Review the features to be installed > Click Next
5. Click Install
6. Click Finish

### 2.2. Opentree Revit Add-in

The Opentree Revit Add-in enables users to manage Revit projects and sheets in Opentree. If this is a requirement, please install on client PC's who have Revit installed and require this functionality. The following section provides steps for installing the Opentree Add-in.

#### Install

1. Run Opentree\_Revit\_2021.exe
2. Click Install
3. Click Close

### 3. About this guide

This guide provides a description of the main functions and interface of Graitec Opentree, and, through a few small examples, the program's working process. The examples follow each description of Opentree functions.

### 4. Launch Opentree Client

Use the Opentree Client to browse folder structure, files and execute advanced file actions.

#### Launch

1. Go to Start > Program Files > Opentree > Opentree.

### 5. Log in and out of Opentree

Log in and out of Opentree Client. To access Opentree a username and password is required. The permissions a user has in Opentree is determined by the Team they are assigned to, and the roles assigned to Team.

**Note:** If you do not have a username or password, please contact the administrator of you Opentree system.

#### Log in to Opentree

1. Enter the appropriate username and password
2. Optional: Check Remember Me to automatically log in the next time you launch Opentree
3. Click the green arrow to log in

#### Log out of Opentree

1. File Tab > Exit Application

### 6. Preview file in Opentree

Preview over 30 file types using Opentree's preview pane. All unsupported file types can be viewed using the default application associated with file type.

#### Preview file

1. Select a file from Opentree folder
2. Select View Tab > Preview Pane. The selected file is displayed in the preview pan.

For navigation options right click in preview pane. **Tip:** To zoom using mouse press CTRL+scroll middle wheel of mouse.

## 7. File Details and History

View details and version history of files in Opentree.

The Details Pane displays information input and captured when creating and importing a file. You can also view who last edited a file and the current keywords.

File History Pane displays versions, date, and actions performed. Each action includes the name of the user who performed action, file properties, and keywords associated with file.

### View File Details

1. Select a file from Opentree folder
2. Select View Tab > Details Pane. The selected file details are displayed in the Details Pane

Using the chevron icon expand and collapse properties and keywords in the file details panel.

### View History Details

1. Select a file from Opentree folder
2. Select View Tab > History Pane. The selected file history is displayed in the History Pane

Using the chevron icon expand and collapse a version to view actions and properties.

## 8. File Tasks

When you perform tasks in Opentree they are displayed in the Task Pane. Tasks can be automated and only appear to show progress while others require user input. Tasks that require user input remain in Task Pane until they are completed.

The following tasks can be seen in the Task Pane:

- Check In (User Input)
- Check Out (Automated)
- Create Document (User Input)
- Update Keywords (User Input)
- Manage Folder Security (User Input)
- Manage Keywords (User Input)
- Edit Folder (User Input)
- Create Folder (User Input)
- Revise (Automated)
- Workflow (User Input/Automated)
- Export (User Input)
- CDE Upload (Automated)

## View Tasks

1. Select View Tab > Tasks. All tasks are displayed in the Task Pane.

Using the chevron icon expand and collapse a Task to view additional information or prompts.

## 9. Open/Check Out files

Files are automatically checked out when selecting the Check Out and Open command in Opentree. The file can only be modified by the user who opened it, no other user can make changes to the file while it is checked out to you.

You can check out a file without opening the file.

### Check Out and Open

1. Select a file from Opentree folder
2. Right click > select Check Out and Open

Alternative Option:

1. Select a file from Opentree folder
2. Home Tab > Select Open from Document Tasks Panel

### Check Out

1. Select a file from Opentree folder
2. Right click > select Check Out

Alternative Option:

3. Select a file from Opentree folder
4. Home Tab > Select Check Out from Document Tasks Panel

## 10. Check In files

After editing a file, you check the file in to store changes.

### Check In

1. From the Task Pane find the Check In tasks
2. Click on the chevron icon on the document to check in
3. Select Check In

Alternative Option 1:

1. Select a checked-out file from Opentree folder
2. Right click > select Check In

Alternative Option 2:

5. Select a file from Opentree folder
6. Home Tab > Select Check In from Document Tasks Panel

## 11. Keywords

Keywords are assigned to folders and files to use as descriptors e.g., Client Name, Project Number, Description, Title.

When creating a folder or file with assigned keywords you will be prompted to enter a value during creation. Keywords can be updated after creation if your Team has a sufficient role. The following section provides steps for updating keywords for folders and files.

**Note:** To add or amend keywords for files and folders please speak to the administrator of Opentree.

### Update Folder Keywords

1. Select a folder in Opentree folder
2. Right click > Select Update Folder Keywords
3. From the Task Pane under Update Folder Keywords > Amend Keyword values
4. Click Done

### Update File Keywords

1. Select a file in Opentree folder
2. Right click > Select Update Keywords
3. From the Task Pane under Update Keywords > Amend Keyword values
4. Click Done

Using the chevron icon expand and collapse a Keyword Groups to view or hide keywords.

## 12. Create File

You can create files in any folder that has document creation enabled and Folder Type assigned.

**Note:** To enable document creation or assign folder types to a folder, please speak to the administrator of Opentree.

### Create File

1. Select a folder in Opentree folder
2. Right click > Select Create Document
3. From the Task Pane under Create Document > Select Template
4. Follow the prompts in Create Document task

## 13. Searching Opentree

Search for files in Opentree using properties and keywords. You can search single or multiple keywords or properties and save searches for future use.

### Access Search

1. Home Tab > Select Search
2. Set the search location to Current Folder or Subfolders
3. Set criteria by selecting keywords and properties. The selected options are displayed in the search criteria pane on the left of dialogue. **Tip:** Click Reset to start over on criteria.
4. Configure and enter criteria for each property and keyword. The search is performed instantly.
5. To change the search location > Click Path in search criteria pane > Select folder
6. To exit search > Click Close Search

### Save Search

1. Select Save > Enter a name for search in search criteria pane
2. To exit or enter your save search list > Click Saved
3. To run a saved search, double click on a saved search from pane
4. To exit search > Click Close Search



## 14. Opentree Workflow

All files stored in Opentree have a workflow assigned. A workflow has stages which are used to define permissions, process, and tasks. A file will start at a specific stage which is viewable as a property. When changing between stages tasks can be assigned.

For example, the start stage for a file could be *Work In Progress* and the second stage is *For Review*. When performing a transition from *Work In Progress* to *For Review* a PDF is required, and when at *For Review* the file can be viewed read only. The creation of a PDF is a task that was assigned between the two forementioned stages and a non-editable permission is set for the stage *For Review*. There are several permissions and tasks available in Opentree to achieve customer requirements.

**Note:** To create, assign or customise workflows, please speak to the administrator of Opentree

### Change File Stage

1. Select a file in Opentree folder
2. Right click > Select a Stage from menu  
**Note:** The options available on right click will vary depending on the workflow assigned to a file.
3. In the Task Pane you will see a task with the name of the stage selected in step 2
  - a. Follow the prompts under your workflow task.
4. Click Done