



What's New

in Opentree 2023



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1. Welcome to Opentree 2023

The 2023 version of **Opentree** introduces several key features as well as improvements to the interface, simplifying common operations and improving overall usability. Less time spent doing repetitive tasks means more efficient use of time.

This document aims to highlight those updates and introduce you to **Opentree 2023**.



2. New Features

The following features have been added to Opentree 2023 and are intended to broaden the capabilities and usability of our software with new ways of working and more powerful document management abilities.

2.1 Sets

Name	Description	Version	Intent
 End of Year Reports	Collection of reports and related documents		
 001-OPE-01-B1-RP-G-0001.docx	Radon Report	P01.01	Safety
 001-OPE-01-ZZ-RP-F-0001.docx	Safety Report	P01.01	Safety
 001-OPE-XX-XX-RP-P-0001.docx	H&S Outcomes	P01.01	Safety

Main features & Benefits:

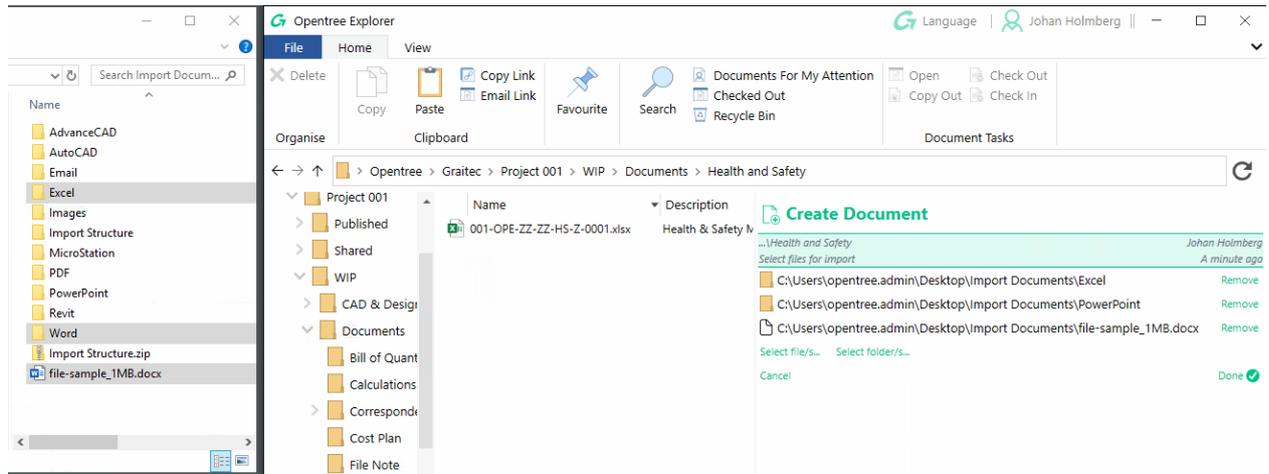
- Quick way to group related items from different areas
- Keep documents accessible in multiple locations without creating duplicate files

Opentree 2023 allows you to create a type of virtual folder called a **Set**. This is a collection of shortcuts to documents that exist elsewhere in the folder structure.

This is a great way to create collections of related documents of different types without generating extra copies, the original documents are still in the same location but can be viewed and edited from the **Set** folder.

NOTE: Users need the new **Author Sets** security right type to create and delete sets.

2.2 Bulk Import and Drag & Drop Import



Main features & Benefits:

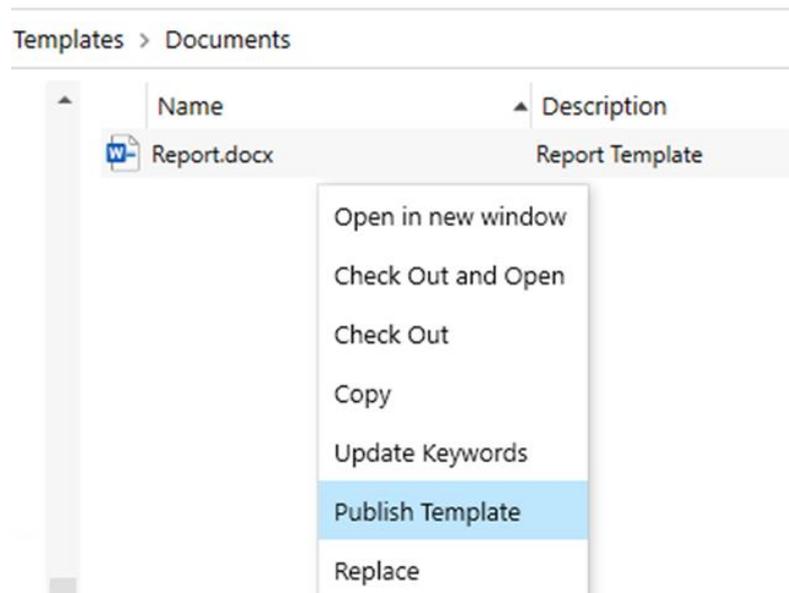
- Drag & drop to add documents into Opentree
- Quickly import large folder structures with varied content
- Overall improvements to importing documents and folder in general

This is a pair of frequently requested features. It is now possible to **drag & drop files and folders** into the Opentree list view to trigger imports. It is also possible to select folders during a regular import to import all of their subfolders and documents.

Bringing large folder structures and large numbers of files into Opentree is now quicker and easier as a result.

When importing a folder structure, the folders created will have the same settings as the parent folder they were imported into.

2.3 Template Management



Main features & Benefits:

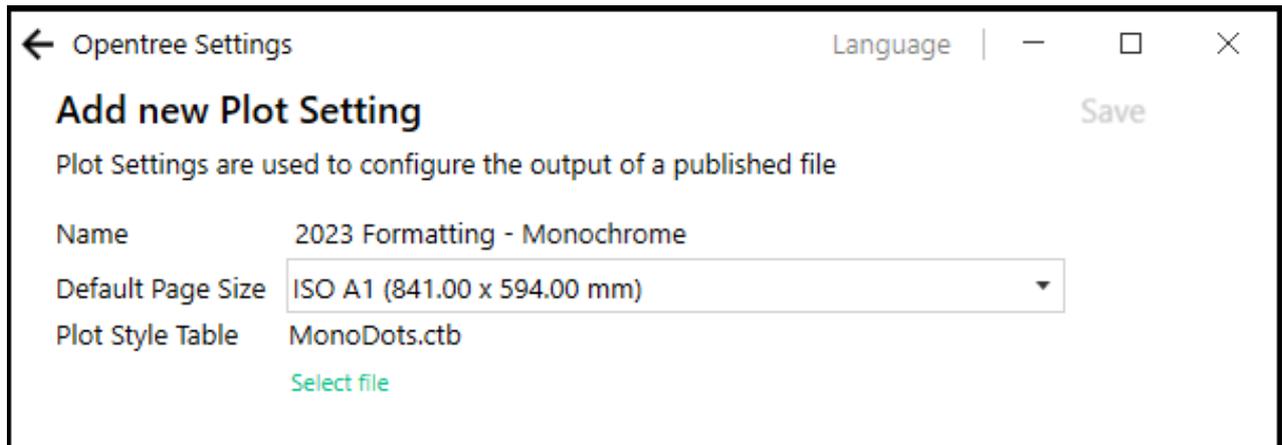
- Manage document templates using Opentree workflows
- Quicker and easier template updates without requiring Administrator module
- Can apply version control to existing templates

A new type of workflow task called **Publish Template** has been added to allow for Opentree templates to be managed and updated from within the application itself. Running this task will replace the document creation template that has the same filename as the current document.

The great advantage of this process is that your document templates can now benefit from version management, review processes and all other Opentree features.

The suggested way to use this is to keep a **Templates folder structure** containing copies of all system templates together with a simple workflow switching the template documents between **WIP <-> Published stages**.

2.4 Plot Settings via Graitec AdvanceCAD 2023



Main features & Benefits:

- Create high quality PDF files from AutoCAD DWG drawings using Graitec Advance CAD
- Use plot style settings to customize your output
- Apply plot settings at a project or folder level as required

Opentree is starting to integrate with the powerful **Graitec AdvanceCAD 2023** toolset. The first feature is being able to plot DWG files to high quality PDF output using *custom.ctb* file plot settings.

When applied to folder structures this allows for projects and individual folders to plot drawings according to internal or 3rd party requirements.

Please note that this does not affect document previews. AdvanceCAD will plot the higher quality output files that are viewable through the **View Attached** task and the documents shown to reviewers during reviews.

The requirements to use this feature are as follows:

1. Create a Plot Setting in the **Settings -> Workflow -> Plot Settings** menu with a .ctb file and specified output paper size.
2. In folder properties add the **Plot Setting**, then choose which file types it should apply to.
3. When attached PDFs are generated for the selected (DWG) file types they will inherit plot settings from their parent folder structure.

NOTE: Requires the installation of **AdvanceCAD 2023** on the **Opentree service host**. AdvanceCAD PDF generation will also need to be enabled in the background service settings. Contact Opentree support for assistance.

2.5 Bind (Flatten) DWG References

Target Document Actions

Copy Attached and Preview	<input type="checkbox"/>
Set Workflow	ISO19650 Workflow ▼
Set Stage	S4 - Stage Approval ▼
Set Naming	ISO 19650 Shared Numbering ▼
Linked Text Group	Retain Current ▼
Update linked text	Database To Document ▼
Update References	<input type="checkbox"/>
Bind (Flatten) References	<input checked="" type="checkbox"/>
Update Preview	<input type="checkbox"/>
Update Attached	<input type="checkbox"/>

Main features & Benefits:

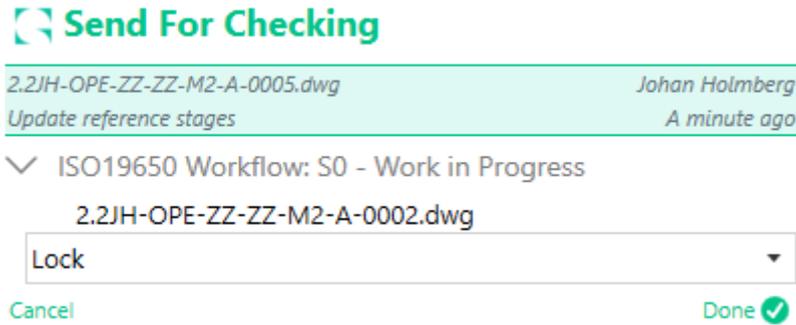
- Automatically bind all DWG references into a single document

All workflow tasks can now be configured to flatten DWG references, including them in the master document.

You can find the new setting available as a simple tick box option when managing workflow tasks in settings.

This is intended to save time when preparing documents for sharing or publishing as complex drawings with multiple references can be flattened into one single finished DWG automatically.

2.6 Reference Locking



Main features & Benefits:

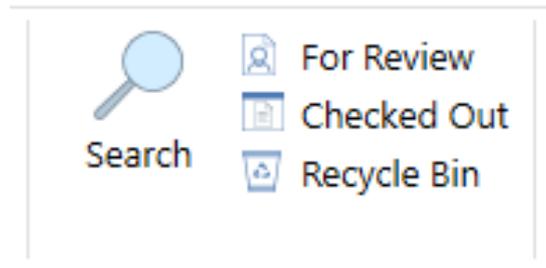
- Apply rules and restrictions for document references
- Avoid reference changes for documents in crucial stages of approval and publishing

Complex models, drawings or other file types often rely on references to other documents or drawings. Controlling these references is a frequent concern, what if someone else edits a reference at the wrong time?

An Opentree feature called **Reference Locking** has been added that can enforce workflow requirements for any document references and guide the reference documents to meet those requirements.

The most common use of this feature would be to push all references into restricted stages where they cannot be edited without first being revised and creating a new version.

2.7 Recycle Bin

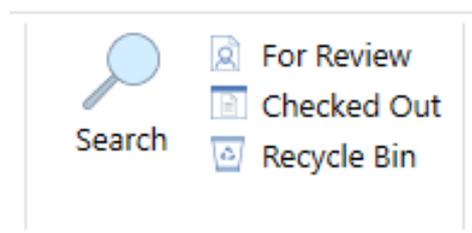


Main features & Benefits:

- Quicker way to find deleted documents and folders

A **Recycle Bin** button has been added to the ribbon. It will open a search that displays deleted items in the current folder path. Previously it was necessary to open a search and configure deleted criteria every time.

2.8 Documents For My Attention/For Review



Main features & Benefits:

- Get an overview of documents that are pending review by yourself or others

A button has been added to the ribbon will display all documents the current user has to review. It is intended to give a better overview of any documents being reviewed as well as allowing you to inspect their properties or navigate to the folders they reside within.

It is also possible to use this feature to view reviews that other users have outstanding.

2.9 External Keyword Population (Keyword Data From SQL)

...Project 020 Johan Holmberg
Just now

Select External Keywords

Project Address Line 1	Project Address Line 2	Project Address Line 3	Project Address Line 4	Project Address Line 5	Project Start Date
Glasgow Airport Limited	Paisley	Renfrewshire	Scotland	PA3 2SW	01 Jan 2018
Civic Centre	Rickergate	Carlisle	UK	CA3 8QG	01 Dec 2017
Cabinet House	Ellerbeck Court	Stokesley Business Park	Stokesley	TS9 5PT	17 Mar 2017
Unit 17	Station Road	Darlington	UK	DL6 3NU	01 Oct 2017
Central Library	Calverley Street	Leeds	UK	LS1 3AB	01 Aug 2017
Heritage Building	Mindelsohn Way	Edgbaston	Birmingham	B15 2TH	12 Oct 2017
Liverpool Lime Street	Lime Street	Liverpool	Merseyside	L1 1JD	01 Oct 2017

There are 7 items [Back](#) [Cancel](#) [Next](#)

Main features & Benefits:

- Populate Opentree keywords using live data from other systems using powerful SQL queries
- Fill out linked values like contact details, locations and names with just one selection

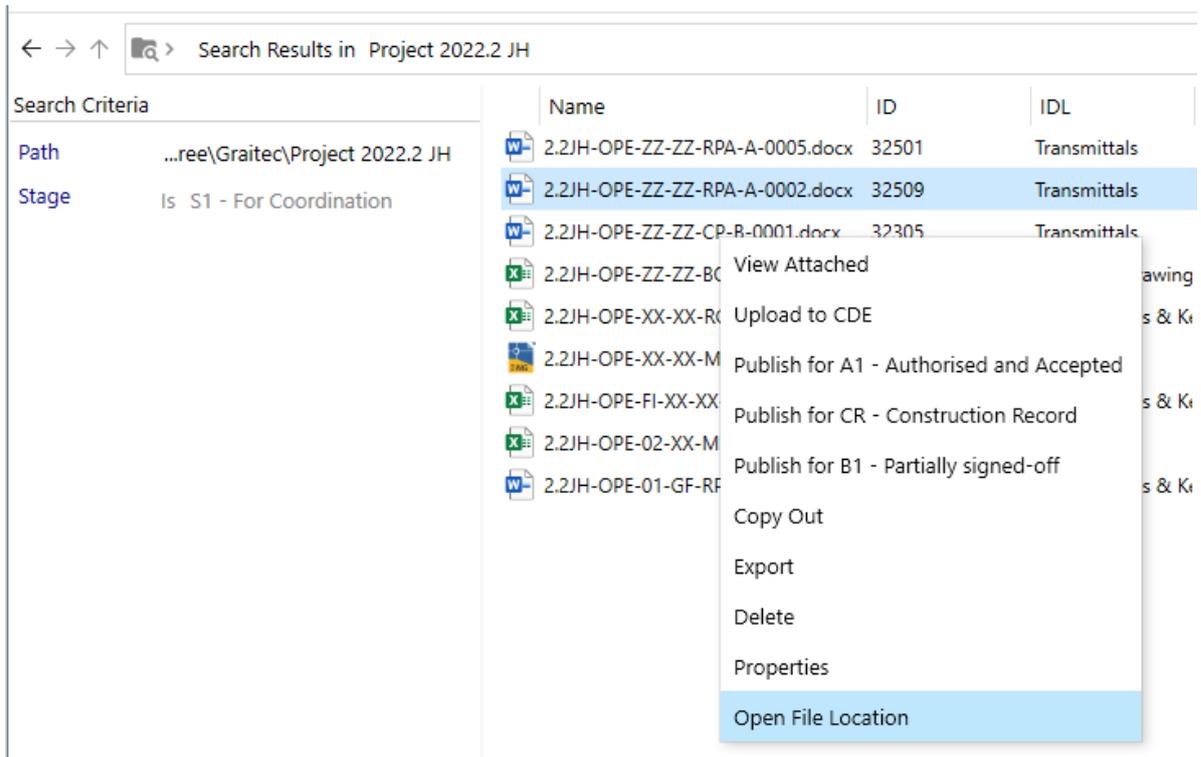
An advanced feature some **Opentree 4.1** users may be familiar with has been added. Document and folder keyword groups can be filled out using sets of values drawn from an existing **SQL database**.

When a keyword group is configured to use keyword population there will be an **ellipsis '...' icon**. Pressing it will display one or more rows of keyword values. Selecting a row and clicking **Done** will populate all applicable keyword fields all at once. It is worth noting that all the shown values do not have to be used. It is possible to show ten columns but only recording a single reference number for example.

Some common uses of this feature are reusing the Opentree user lists and filling out contact details such as addresses and phone numbers. The data can also be pre-processed as part of the query, combining values or trimming text for example.

Setting up this feature requires setting up appropriate keyword groups and SQL queries in Opentree Administrator so will most likely require some support.

2.10 Opening File Locations from Searches

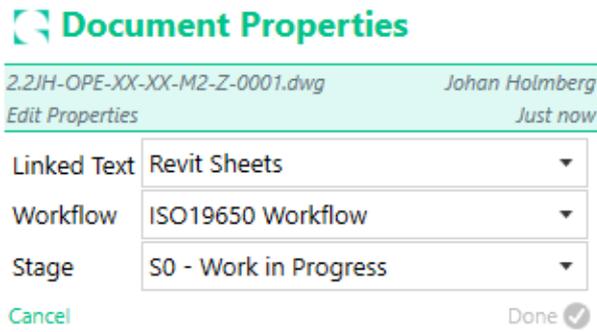


Main features & Benefits:

- Navigate directly to folders from searches

An extra option has been added when viewing search results. You can now right-click on a document and find a new menu option called **Open File Location** which will take you out of the search and navigate to the folder the document is located in.

2.11 Editing Document Workflows and Linked Text Groups



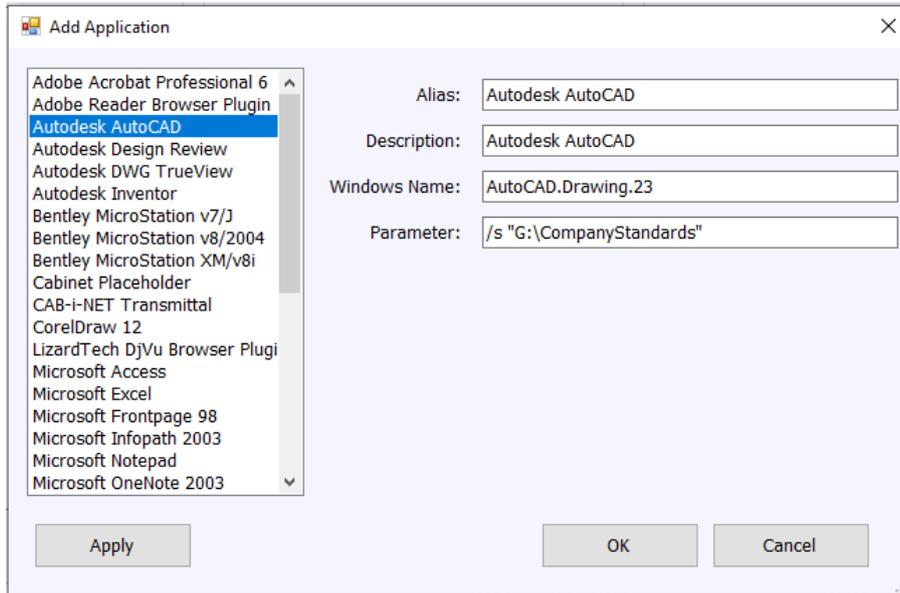
Main features & Benefits:

- Ability to easily see which workflows documents belong to
- Directly edit the workflow, stage and linked text settings of live documents
- Easier to test and implement new workflows

Previously document workflows and linked text groups were fixed on creation and could not be changed without support intervention. These can now be changed for live documents by right-clicking on them and selecting **Properties**.

Document workflow is now also available as a list view column that can be added to views or used as search criteria.

2.12 Launching Applications with Parameters



Main features & Benefits:

- AutoCAD Civil 3D support
- Control the way applications are launched when opening documents

Applications defined in Opentree can now be started with custom starting parameters. This is helpful for launching applications or opening documents using alternate methods.

The actual uses of this feature are up to the applications themselves, but examples include loading add-ins, defining support paths, or running custom scripts. As it is possible to mix this with combinations of intents and filetypes it means that documents in different folders could be opened in completely different ways!

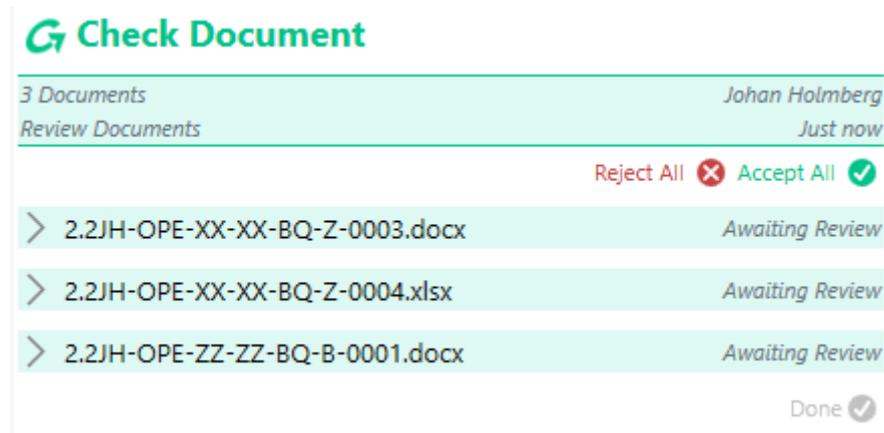
When your new customer only accepts documents with custom settings you can ensure that those settings are always loaded for their project documents automatically, so your staff don't need to spend time switching settings manually every day.

The most common use for this feature is to launch **AutoCAD Civil 3D** directly from Opentree.

3. Updated Features and Improvements

Some features have received changes and improvements in **Opentree 2023** to make them quicker and easier to use.

3.1 Accept All / Reject All



Main features & Benefits:

- Quickly accept or reject large numbers of document reviews

A new pair of buttons allow you to accept or reject document reviews in bulk. This is a time saving feature for real world situations where the checker may have already seen the documents while collaborating or when the outcome is clear for any other reason.

These buttons can be combined with individual reviews as well so you can accept and reject a few documents one by one and reject the remainder.

3.2 Reference Pane

References

- 2.2JH-OPE-01-01-DR-A-0001.dwg
- > 2.2JH-OPE-XX-XX-DR-Z-0001.dwg
- 2.2JH-OPE-ZZ-01-DR-F-0001.dwg

Referenced By

- 2.2JH-OPE-XX-XX-M2-Z-0001.dwg

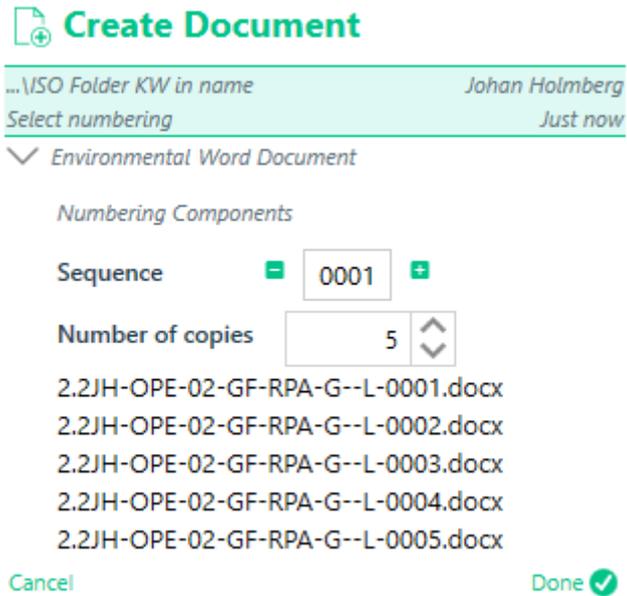
Main features & Benefits:

- View document reference hierarchies including nested references
- Quickly navigate to document references in different folders

The **Reference Ribbon** has been transformed into a full pane, joining the other ways of displaying additional document information. The new format makes large reference hierarchies easier to view and interact with.

It is possible to right click on a reference and detach it as well as opening the containing folder that the references are in, making them easier to locate and work with.

3.3 Creating or Pasting Multiple Document Copies



Main features & Benefits:

- Create any number of document copies with one action

When creating Opentree documents from templates or performing a copy & paste operation there is now an option to create multiple copies.

This is intended to save time when there is a need to create a large number of similar documents.

3.4 Default Keyword Values

Create Document

...\2D Model Johan Holmberg
Select keywords Just now

ISO 19650 Naming Codes

Volume / System *

Level / Location *

Role *

Document Information

Description

Cancel Next ➔

Main features & Benefits:

- Faster and easier document and folder creation

Document and folder keywords can now be set up to have default values. This will save time and effort when creating a lot of documents or folders as every field doesn't always have to be filled out every time.

By adding an '*' asterisk star at the end of a keyword value when configuring the keyword that value will appear as the default value inside Opentree.

4. Minor & Configuration Updates

Opentree 2023 also delivers a couple of minor updates, as well as updates to how the software can be configured:

- Automatic document numbering now allows for contributing keywords not to be present. Previously document creation would be held up by missing keywords, but it will now proceed and ignore the missing info, allowing for completely optional parts in document names.
- Manage **Teams** now lets you add multiple users to a role with single clicks, the user list doesn't close after adding each user.
- It is now possible to inspect Opentree user accounts and see which Teams and Roles they are members of, reducing the need to cross-reference users and security settings.
- **Copy To** tasks can now set the **Linked Text Group** of the target documents. This can be used to limit document updates or restrict the information included in documents, for example stripping out names and personal information from documents that will be shared with 3rd parties.
- When creating and using saved searches Opentree will remember the views used for them. This allows for quicker focus on data and results.