



# Getting Started Guide

Version 2.0

July 15



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DEVELOPED BY

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# 12d Synergy V2 Getting Started Guide

V2.0 August 14

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# 1 What is 12d Synergy?

12d Synergy is a data management and collaboration system. It is intended to provide one source of information for all of your organisation's data, keep track of all changes and provide access to historical data. This helps you find the right data when you need it and helps prevent accidental edits that might corrupt or destroy previous work.

It also provides a platform for task management as well as user communication about pieces of work.

## 1.1 Basic Concepts

### 1.1.1 File Check Out / In

When working with files, 12d Synergy operates on a 'check out' / 'check in' basis. This means that users cannot edit two files at the same time. When a file is 'checked out', it is locked for editing by other users. Until the user checks the file back in, nobody else can edit it – but they can still read it.

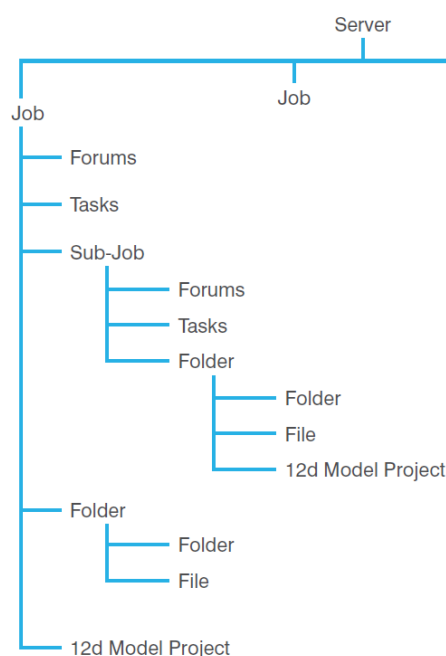
### 1.1.2 Servers and Clients

12d Synergy is a client and server application. This means that the 12d Synergy server houses all the organisational data and you connect via a 12d Synergy client.

This means 12d Synergy could be running on different servers in different locations, so you will need to find out which server you should connect to from your System Administrator.

### 1.1.3 Data Structure

The data structure for 12d Synergy is displayed below. Each component will be discussed within this manual and it will describe how to work with each.



Sample hierarchy of 12d Synergy Files



### **1.1.3.1 Server**

The primary 12d Synergy Server to which you will be connecting to edit your data.

### **1.1.3.2 Jobs**

Everything within 12d Synergy is grouped into user defined 'jobs', which are a logical grouping for a piece of work. All data is stored in some fashion within one job, but may be shared with other jobs. A job can contain other jobs, forums, task lists, forums or 12d Model Projects.

### **1.1.3.3 Folders**

A folder is the basic logical grouping for files, but can also contain other folders, just like in Windows Explorer.

### **1.1.3.4 File**

A normal file that can be viewed or edited.

### **1.1.3.5 Tasks**

A list of tasks or pieces of work assigned to contacts and users.

### **1.1.3.6 Forums**

A collaborative way for users to communicate and discuss ideas.

### **1.1.3.7 Permissions**

Permissions are controlled by your system or job administrators. Not everything in 12d Synergy may be visible to you, and you may only have read access to certain parts of the system.



## 2 An overview of the main 12d Synergy window

### 2.1.1 12d Synergy Layout

**My Active Items** – lists tasks in all jobs assigned to you (quick way to view)

**Task**– click on tab to show active tasks  
**Check outs**– click on tab to show checked out items

**Quick Search** – type file name to locate within current selection

**Menu**– click on each tab to view drop-down options

**12d Synergy Ribbon**– click on icon to perform selected task

**File List**– displays the files located in the selected folder

**File Details**– click on tabs to view details on a selected file

**Job Tree**– shows structure of Job Tree (see 2.1.2).

**Filter field**– type in required text to filter the files displayed

**Refresh button**– click to refresh the screen

**Server information**

Name	Value
<b>Server information</b>	
File name	12d Synergy Getting Started.docx
Server Path	Synergy_Highway_0001/Training/12d Synergy Getting Started.docx
Server version	1
Last server change by	Cameron Novini
Last server change	8/01/2014 10:06:29 AM
Server file size	8/01/2014 10:06:29 AM

**File List Table:**

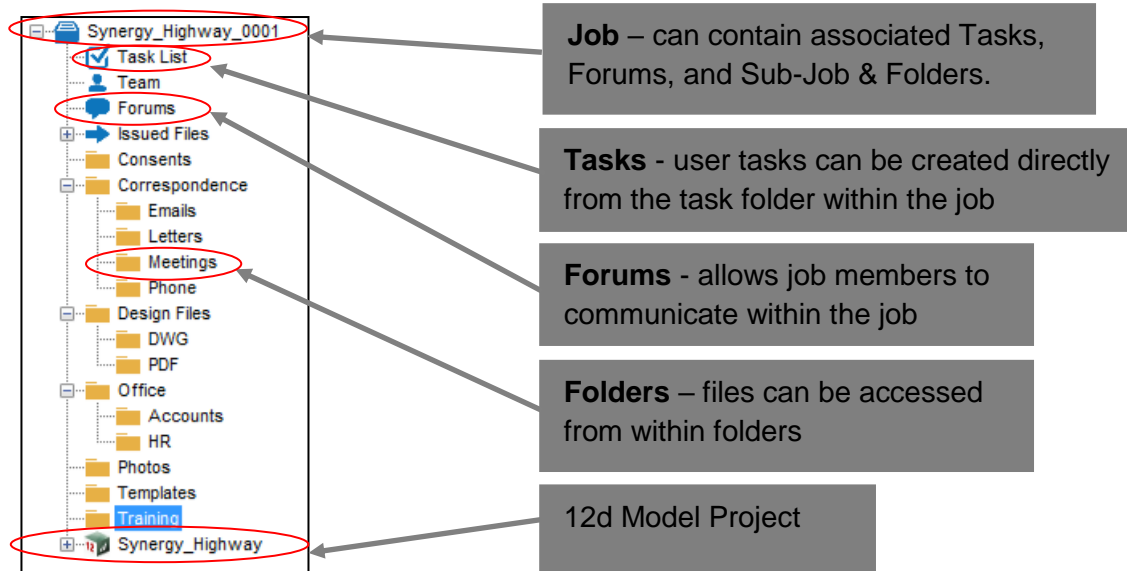
File	St...	Last Changed...	Last Server Cha...	Checked...	Vers...	File S...	Outdat...
12d Synergy Job Structure.PNG	None	Cameron Novini	8/01/2014 10:06:2...	No	1	28.96 ...	
12d Synergy Training Video.wmv	None	Cameron Novini	8/01/2014 10:06:2...	No	1	74.68 ...	
12d Synergy - Hints and Tips.doc	None	Cameron Novini	8/01/2014 3:11:46...	No	2	24.50 ...	
12d Synergy Getting Started.docx	None	Cameron Novini	8/01/2014 10:06:2...	No	1	8.09 MB	
	None	Cameron Novini	8/01/2014 10:06:2...	No	1	1.69 MB	





## 2.1.2 12d Synergy Job Tree

The 12d Synergy Job tree is how you navigate quickly through your 12d Synergy Job. As discussed previously, this could contain many sub jobs, but you can navigate easily through part of the job using the tree.





## 3 12d Synergy Servers

As 12d Synergy is a client / server application, to do anything, you must nominate the server to connect to. Be aware that your organisation may have more than one server in different locations. Your administrator can provide you with this information.

### 3.1 Connecting to a Server

#### 3.1.1 Connecting the first time

If 12d Synergy has not previously been told to connect automatically to a specific server upon start-up, you will need to enter details when the server connection screen appears

Type in the server name or IP address of the 12d Synergy server you wish to connect to. From here, you can choose whether to tick the box 'Connect to this server' each time starting up 12d Synergy. (Ticking this box ensures 12d Synergy will always connect to the nominated server, and this panel will no longer pop-up each time 12d Synergy is opened.)

#### 3.1.2 Connecting via the Recent Jobs screen

If you have connected to a server and a job, 12d Synergy will present you with the list of your recent jobs and any favourites you may have set up.

Name	Server	Date
Synergy_Highway_0001	Sydney-Server-1	9/01/2014 2:27:53 PM

Information	
Name	Value
Job Number	1
Job Name	Synergy Highway
Job Name Short	Synergy Highway
Job Status	In Tender
Site	Sydney
Site Address 1	24 Sydneyham Road, Sydneyham, NSW, 2067, Australia, . . .
Site Manager	Rebecca Smith

Select the Job you wish to work on and click the 'Open' button at the bottom of the screen.

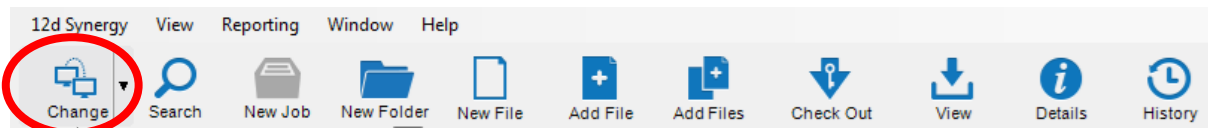
Alternatively, if you don't see the job you want, simply click 'Find Job'. If you have not nominated a favourite server, you will be prompted for the server again.



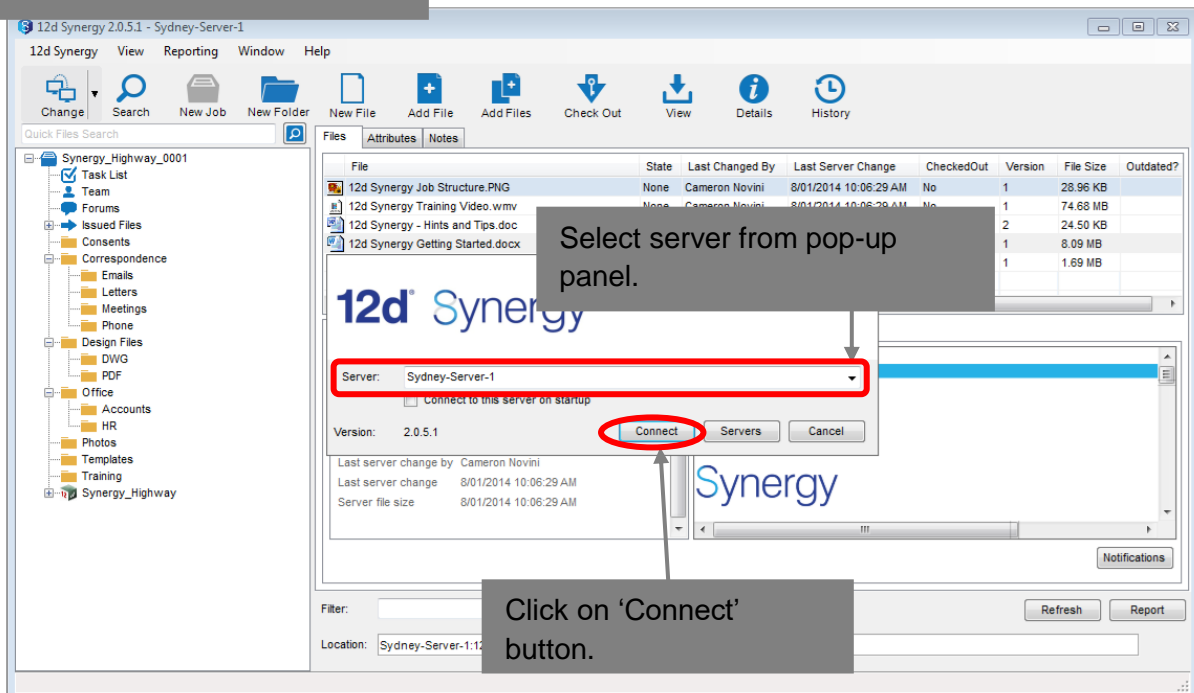
## 3.2 Changing 12d Synergy Servers

There are three options to change the server you are connected to:

### 3.2.1 Via the Ribbon

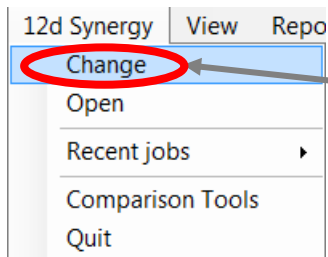


Click on the pull-down menu next to 'Change' on the Task Bar and select 'Change server'.





### 3.2.2 Via the Menu



Click on the '12d Synergy' menu.

Click 'Change' on drop-down options.



Choose required server from pop-down options.

Click on 'Connect' button.

## 3.3 Connecting outside your Office

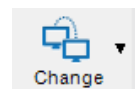
If your System Administrator allows it, you may be able to connect to the 12d Synergy server over the internet or a VPN from outside your office. Please contact your System Administrator for the address details.

In this case, you will want to modify your server details to include a 'Remote' address to help optimise your connection.

### 3.3.1 Configuring a Remote Connection

You must connect at least once to the server.

When you have done so, click the 'Change' button to drop down at the top left of the screen and select 'Change server'.



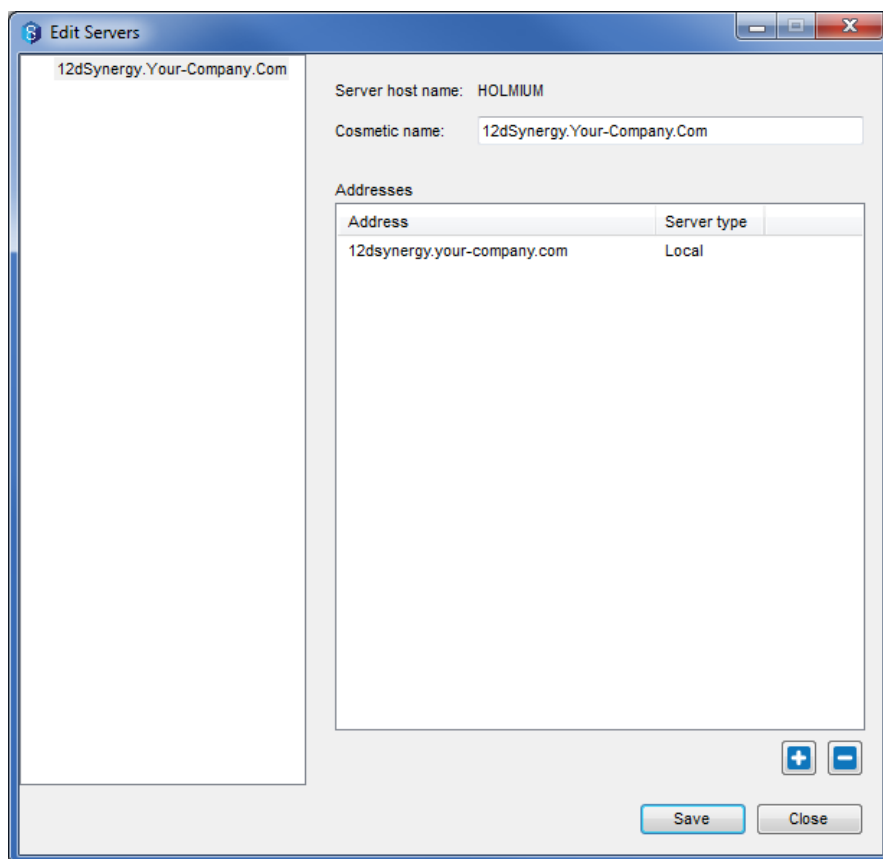
Click the 'Servers' button



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This will display the following window:



This window shows all the servers you have connected to and their addresses.

If you are connecting from outside your office, simply select the server and click '+'

Add the remote address and set the server type to **Remote**.

This will ensure you get the most optimised connection type for accessing the server from outside the office.



## 4 Working with Jobs

A job is the highest level grouping within 12d Synergy and represents all the information for a piece of work or set of data. Whenever you are working with any data in 12d Synergy in the typical view, you will connect directly to a job.

As a user you may not have access to every job in 12d Synergy – this is defined by your System Administrator.

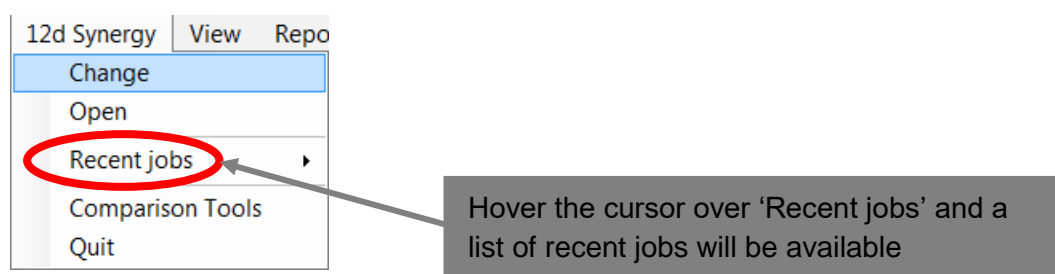
Note: More than one 12d Synergy Client can be open at the same time, so there is no need to exit one to open another for access to different Job Tree files.

### 4.1 Working with a Job

To start working with jobs, you must select one, which can either be done by using a Recent Job or by selecting a server and finding a Job.

#### 4.1.1 Recent Jobs

You can access the most recent accessed 12d Synergy jobs from the 12d Synergy menu.



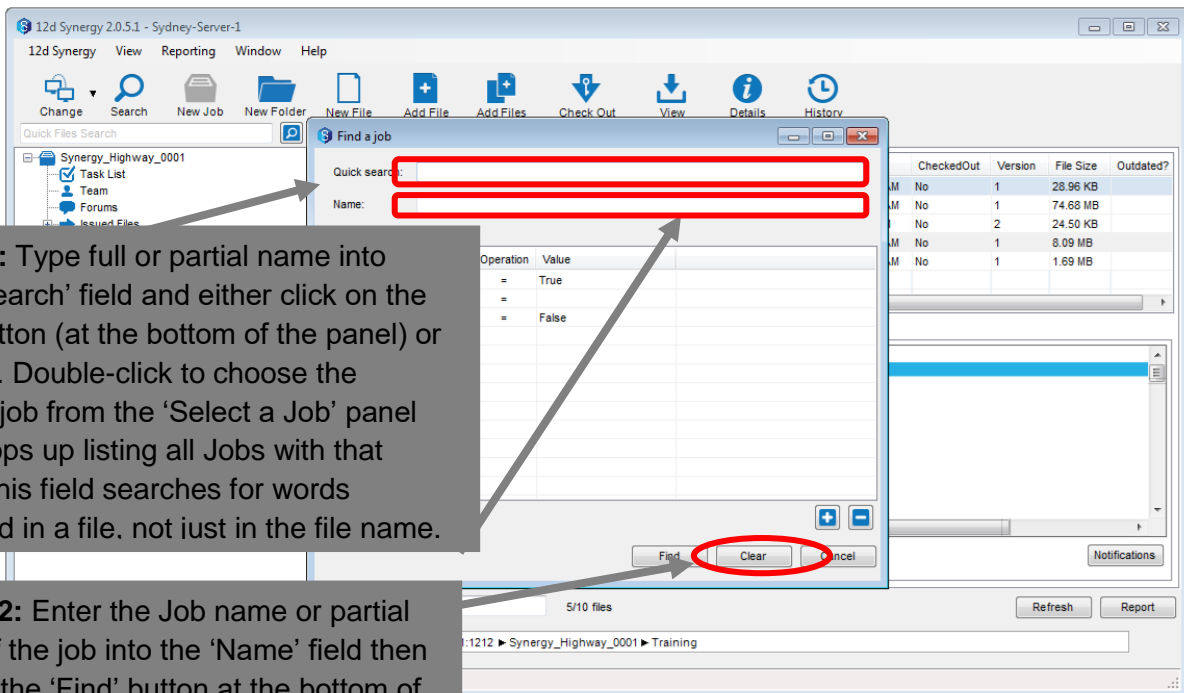
#### 4.1.2 Finding a Job

You may wish to change jobs while in 12d Synergy. This is achieved by clicking the 'Change' button in the top left-hand corner of the screen:



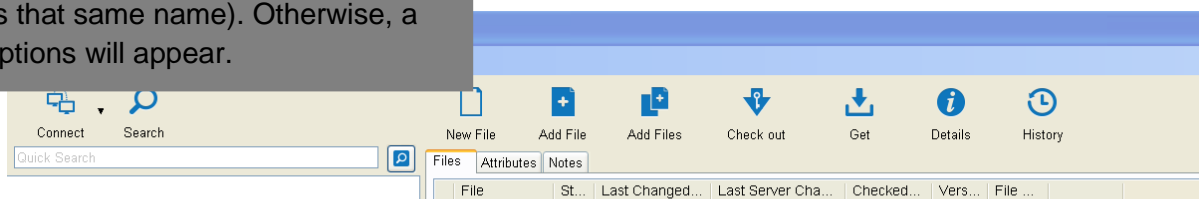
Selecting this option brings up the 'Find a job' panel.

Select the Job you want to open in the 'Find a job' panel by using either of the following methods:



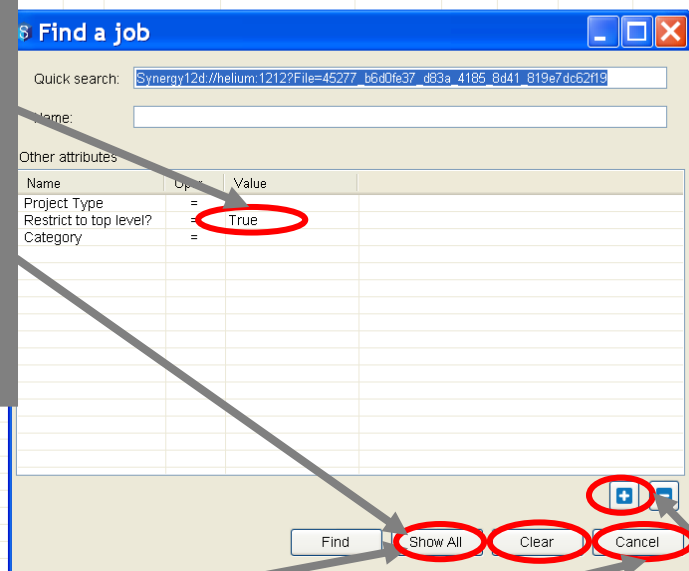
**Option 1:** Type full or partial name into 'Quick search' field and either click on the 'Find' button (at the bottom of the panel) or hit Enter. Double-click to choose the relevant job from the 'Select a Job' panel which pops up listing all Jobs with that name. This field searches for words contained in a file, not just in the file name.

**Option 2:** Enter the Job name or partial name of the job into the 'Name' field then click on the 'Find' button at the bottom of the panel or hit Enter (12d Synergy will go straight to the nominated job if only one Job has that same name). Otherwise, a list of options will appear.



**Option 3:** Select search criteria in the 'Other attributes' pop-down menus which display when clicking on each of the 'Value' fields (eg. Project Type or Category).

Click the 'Find' button (at the bottom of the panel) or hit Enter. Double-click to choose the relevant job from the 'Select a Job' panel which pops up listing all Jobs which contain the specified name/attributes.

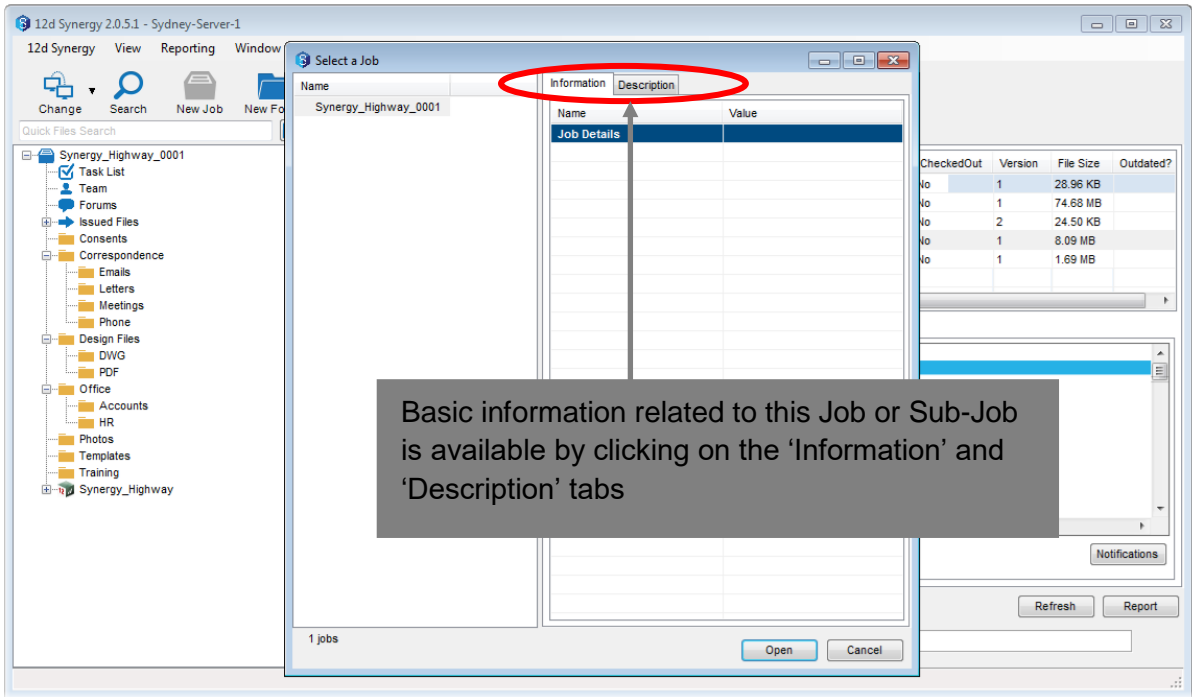


Clicking 'Show All' and 12d Synergy will display all the Jobs and Sub-Jobs you

Clicking on 'Clear' will clear all the attributes entered into the 'Value'

Add additional job attributes in your search by clicking on the '+' button and selecting required attributes (e.g.

4. Identify the Job or Sub-Job required from the displayed 'Select a Job' panel:







### 4.1.3 Job Information Pane and Dashboard

To see general information about a job, click the icon on the tree for the job.

This will provide you with basic information about the job, along with additional details.

Click on parent Job icon

Dashboard tab

Checked out files are displayed

**Note:** Widening of columns works as in Windows Explorer – i.e. double-click on the right side of the column to widen to the width of the row with the most number of characters (not including headings).

File	St...	Last Changed...	Last Server Change	Checked...	Vers...	File S...	Outdat...	Path
12d Synergy - Hints and Tips.doc	None	Cameron Novini	8/01/2014 3:11:46 PM	Yes [You]	2	24 50 ...		Synergy_Highway_0001/Training/12

This panel displays details of you're checked out files:

**File** – name of file.

**State** – shows if workspace copy is different from 12d Synergy Server; also shows if it is a linked file.

**Last Changed By** – the name of who made changed to the file.

**Last Server Change** – date and time of when the file was modified on the 12dS server.

**Checked Out** – the name of the person who checked out the file.



### **4.1.4 Associations**

Jobs can be associated with other entities. This is a casual way of indicating a relationship between other entities, such as a job and a task, a job and a contact, and so on.

### **4.1.5 Attributes**

Files can have additional information attached as 'Attributes'. A good example is the Subject, Sender, and Receive Date and so on for an email. Custom attributes can also be attached to help describe files in ways that make sense for your job, and can be used in searching.

### **4.1.6 Notes**

Notes can also be attached to jobs, along with many other entities within 12d Synergy. To see information on how to add or read notes, please see the 'Notes' Section



# 5 File and Folder Management

Managing your files in a safe and traceable manner is the core function of 12d Synergy. 12d Synergy will:

- Keep track of who has changed a file
- Require users to describe why they changed a file
- Allow users to look at previous versions of a file
- Prevent two users from making changes to the same file at the same time

Files are grouped into folders.

## 5.1 The Local Workspace

When you are working on files in 12d Synergy, the latest version will always be copied to what is called your 'local workspace'. This is an area reserved on disk for your local files, and is usually defined by the System Administrator at installation time.

Please note that until you have uploaded a file, any changes you have made will be on the local machine. If you try to access a file that has not been uploaded (checked in) on another machine, then you will not see your changes.

## 5.2 Working with Files in 12d Synergy

12d Synergy operates on what is known as a 'check in' / 'check out' basis. This means that files must first be locked by 'checking' it out, and later uploaded and released by 'checking it in', or by cancelling the check out.

While a file is checked out by another user, it cannot be edited but it can still be viewed.

### 5.2.1 Viewing Files

#### 5.2.1.1 Via the Ribbon Bar

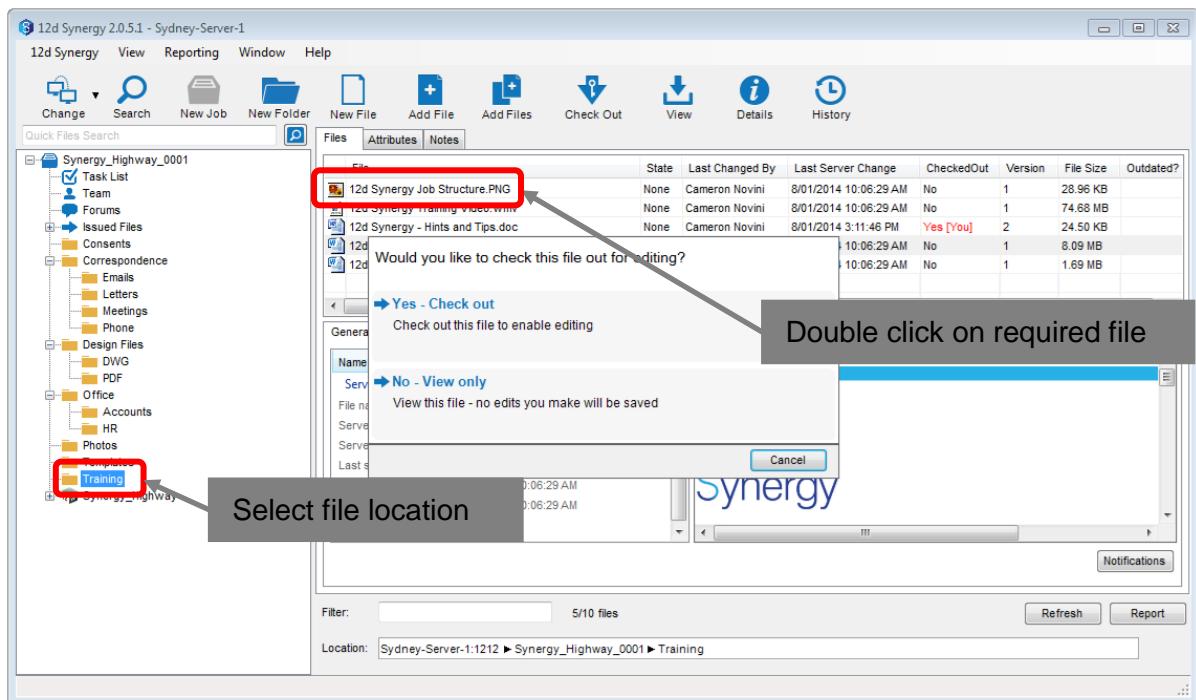
You can view files while in 12d Synergy by clicking the 'View' button on the right-hand side of the ribbon bar at the top of the screen:



The selected file has been opened in read-only mode. Changes cannot be made to the original document. A new copy of the document needs to be created to enable changes to be saved.



### 5.2.1.2 Via Double Click



**Would you like to check this file out for editing?**

→ **Yes - Check out**

Check out this file to enable editing

→ **No - View only**

View this file - no edits you make will be saved

Cancel

**'Yes – Check Out'**

This option Checks out the file and stops any other users from being able to check it out. The checked out file can't be opened by any other users.

**'No – View only'**

The file will be opened for viewing purposes (if changes need to be made, the file should be checked out)

**'Cancel'**

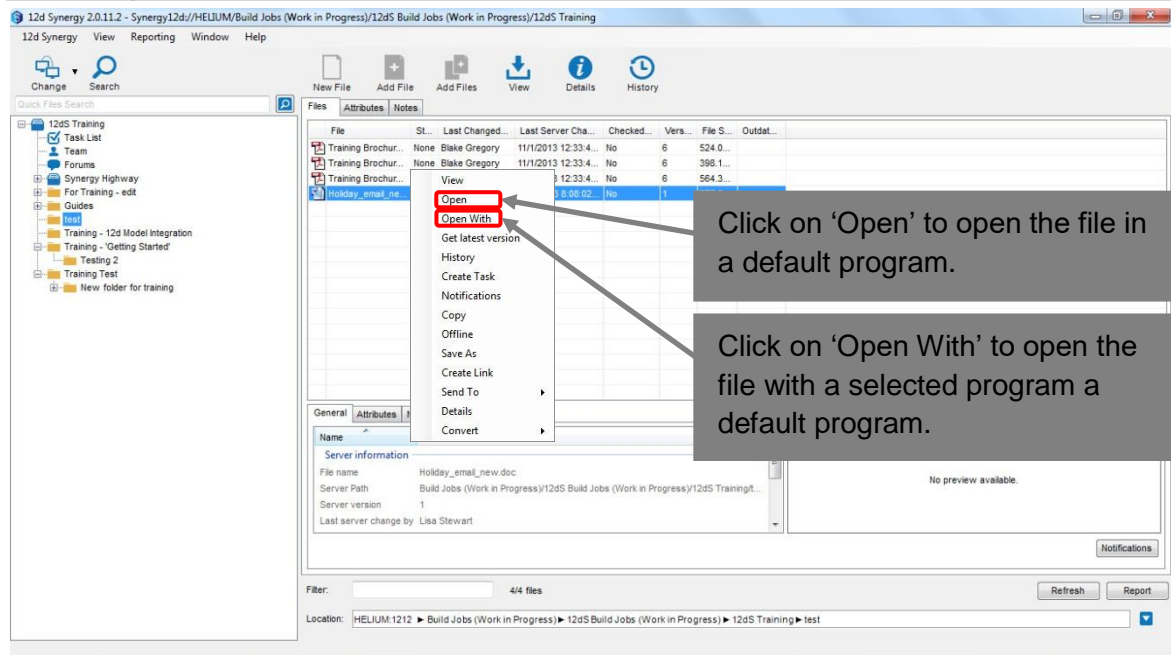
Cancels opening the file.

**Shortcut:** Double-click on required file in the file area while holding 'Control' enables a selected file to be automatically opened without being checked out (ie. the panel does not pop up questioning checkout options)



### 5.2.1.3 Via Right Click Context Menu

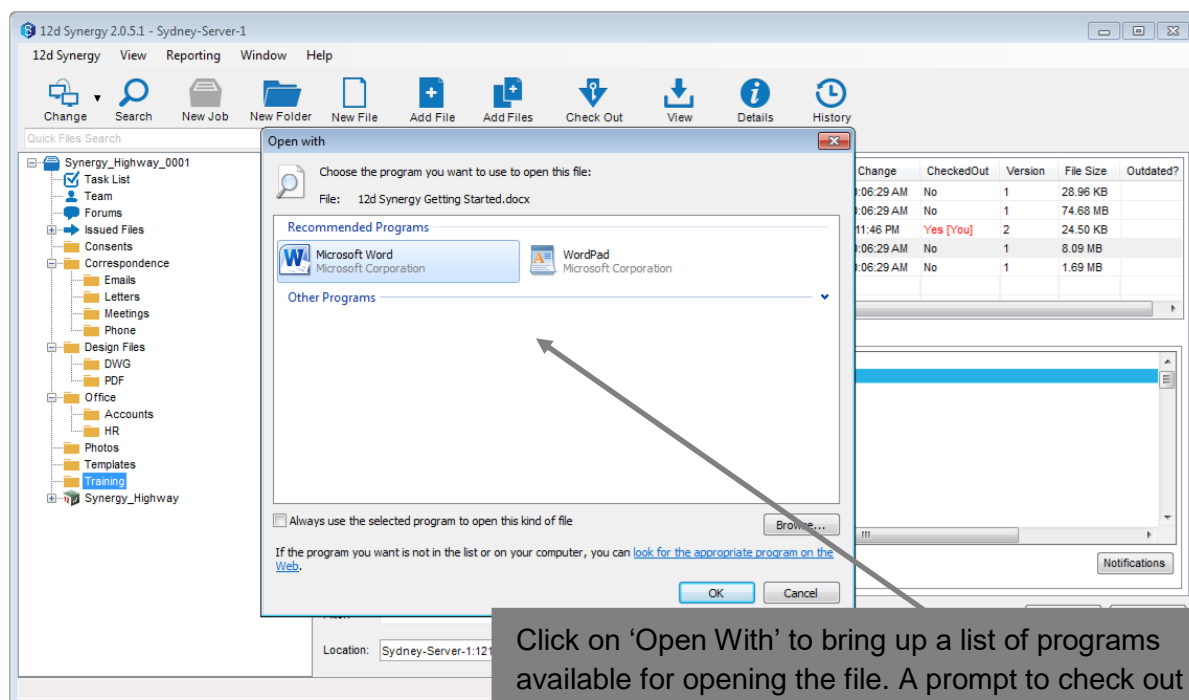
#### 5.2.1.4 Open



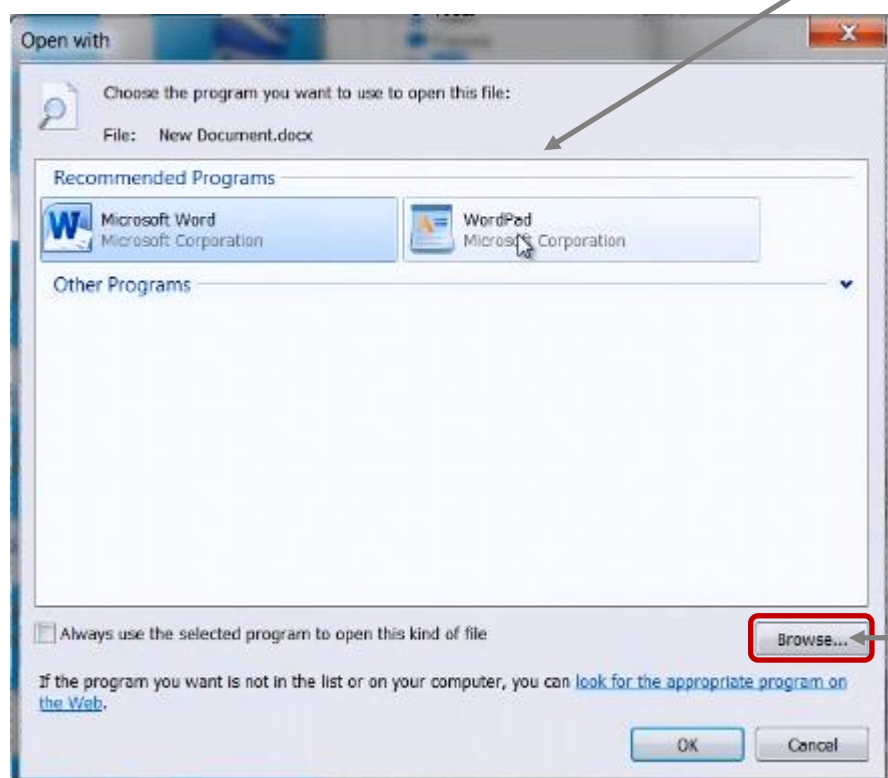
**Note:** This menu option opens the version in the workspace. If 'State' is 'Outdated' you may need a 'View' to download the latest version from the 12d Synergy Server.



### 5.2.1.5 Open With



Click on 'Open With' to bring up a list of programs available for opening the file. A prompt to check out the file will appear.



Click 'Browse' to find more programs to use.



## 5.2.2 Checking Out Files for Editing

To update a file on the 12d Synergy Server, a user must check out a file, make edits, and then check in the file to the 12d Synergy Server.

When a file is checked out, no other users can check out that file. While a file is checked out other users may 'View' the checked out file, however they won't be able to check in any edits they make to the 12d Synergy Server.

During the check out process, the latest version of the file is automatically copied to your 12d Synergy workspace (the default location for this is C:/12dSynergyWorkspace). Edits will be made to the file in the 12d Synergy workspace (which is much faster than working off a Server). Once the edits of a checked out file are completed, the user will check in the file, 12d Synergy will then send the latest version of the file from the local workspace back to the 12d Synergy Server to be updated.

This Check in/Check out system is common across most document management systems.

There are several ways you can check out a file.

### 5.2.2.1 Via the Ribbon Bar

Click 'Check Out' icon on Task Bar & file will open for editing.

Select location of file

Click to select required file

File is flagged as checked out by you.

File	State	Last Changed By	Last Server Change	CheckedOut	Version	File Size	Outdated
12d Synergy Job Structure.PNG	None	Cameron Novini	8/01/2014 10:06:29 AM	No	1	28.96 KB	
12d Synergy Training Video.wmv	None	Cameron Novini	8/01/2014 10:06:29 AM	No	1	74.68 MB	
12d Synergy - Hints and Tips.doc	None	Cameron Novini	8/01/2014 3:11:46 PM	Yes [You]	2	24.50 KB	
12d Synergy Getting Started.docx	None	Cameron Novini	9/01/2014 4:22:13 PM	No	3	8.09 MB	
12d Synergy Installation Procedures.docx	None	Cameron Novini	8/01/2014 10:06:29 AM	No	1	1.69 MB	

5/10 files

Refresh Report

Location: Sydney-Server-1:1212 ► Synergy\_Highway\_0001 ► Training



### 5.2.2.2 Via Right Click

The screenshot shows the 12d Synergy 2.0.5.1 interface. The left pane shows a tree view with 'Training' selected. The main pane shows a file list with '12d Synergy - Hints and Tips.doc' selected. A right-click context menu is open over the selected file, with 'Check out' highlighted. A callout box points to the 'Check out' option, stating 'Click on 'Check out' option & file will open for editing.' Another callout box points to the 'Yes (You)' checkbox in the 'CheckedOut' column, stating 'File is flagged as checked out by you.' A third callout box points to the 'Training' folder in the left pane, stating 'Select location of file'. A fourth callout box points to the file name in the list, stating 'Right-click on required file'.

File	State	Last Changed By	Last Server Change	CheckedOut	Version	File Size	Outdated?
12d Synergy Job Structure.PNG	None	Cameron Novini	8/01/2014 10:06:29 AM	No	1	28.96 KB	
12d Synergy Training Video.wmv	None	Cameron Novini	8/01/2014 10:06:29 AM	No	1	74.68 MB	
12d Synergy - Hints and Tips.doc	None	Cameron Novini	8/01/2014 3:11:46 PM	Yes (You)	2	24.50 KB	
12d Synergy Getting Started.docx	None	Cameron Novini	8/01/2014 10:06:29 AM	No	1	8.09 MB	
12d Synergy Installation Procedures.docx	None	Cameron Novini	8/01/2014 10:06:29 AM	No	1	1.69 MB	

The screenshot shows the 'Describe this change' dialog box. The text area contains the text 'file no longer needed'. The 'Submit' button is highlighted with a red box. A callout box points to the 'Submit' button, stating '5. Click on 'Submit' option after describing the change.'

Please describe this change.

file no longer needed

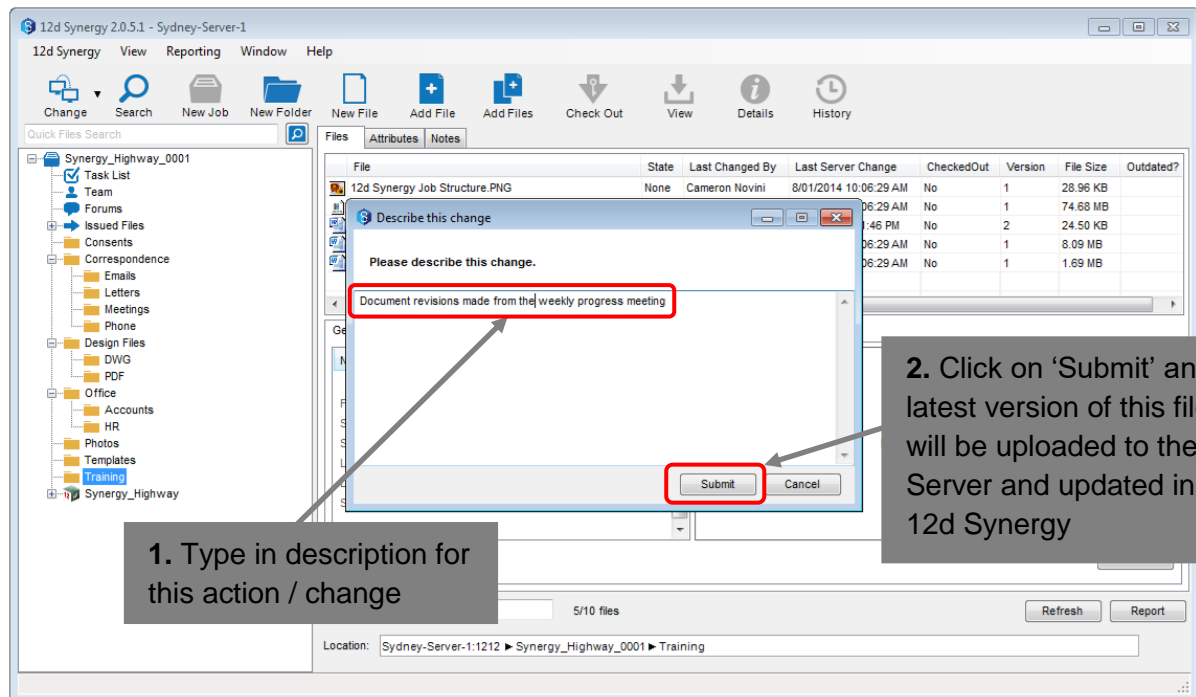
Submit Cancel



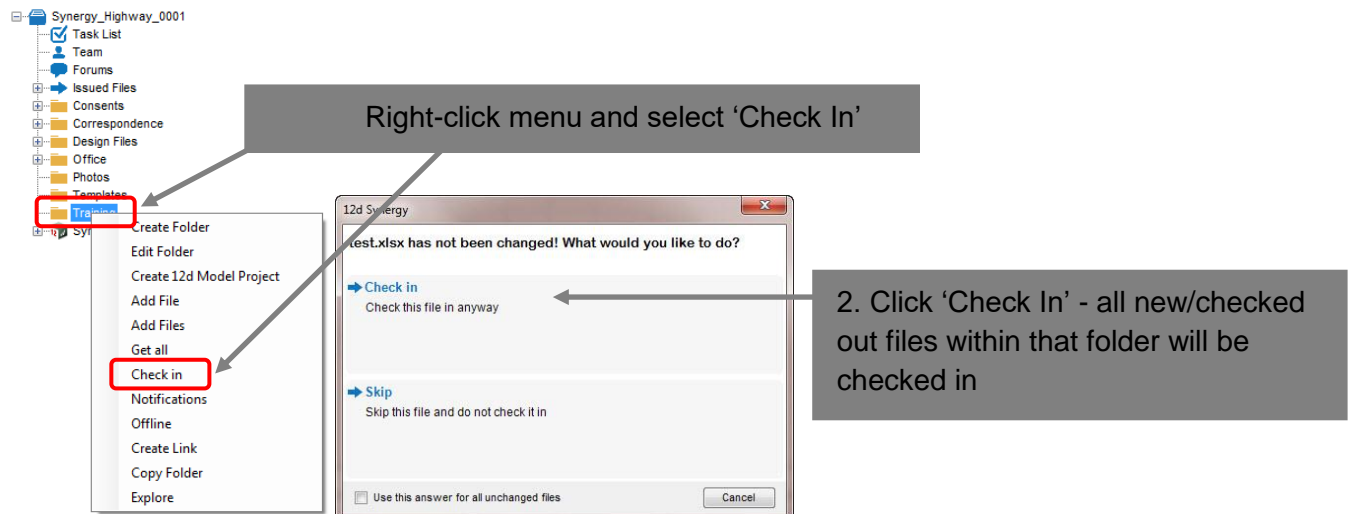


### 5.2.3 Saving changes to a file by checking in

After completion of editing, a file must be checked in to save the changes within 12d Synergy and to allow editing by others. When exiting a file, the following prompt panels will appear:



### 5.2.4 Checking In a Folder of Files

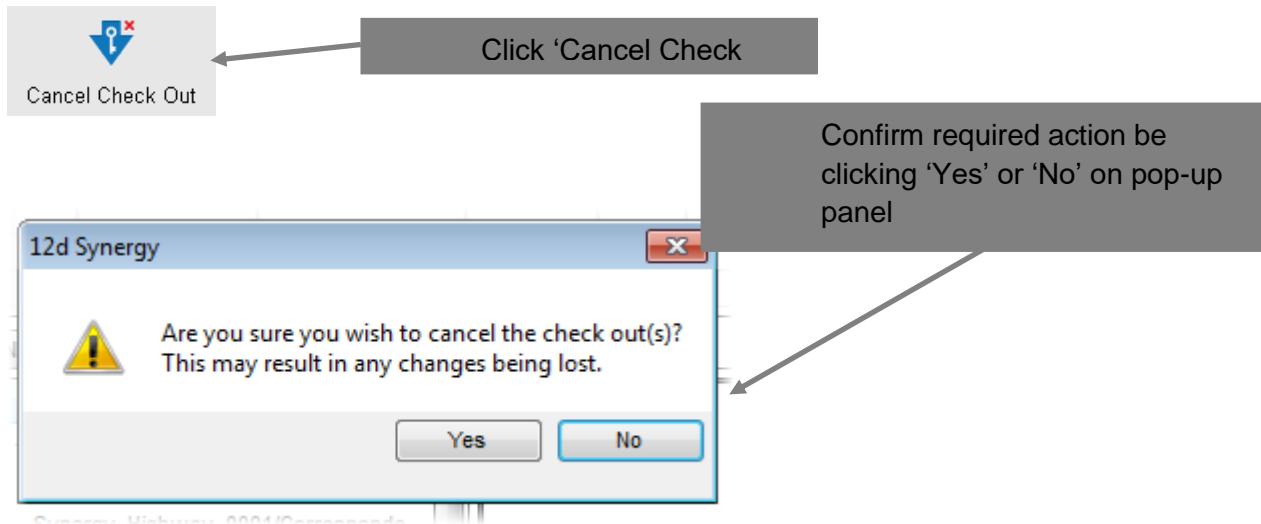




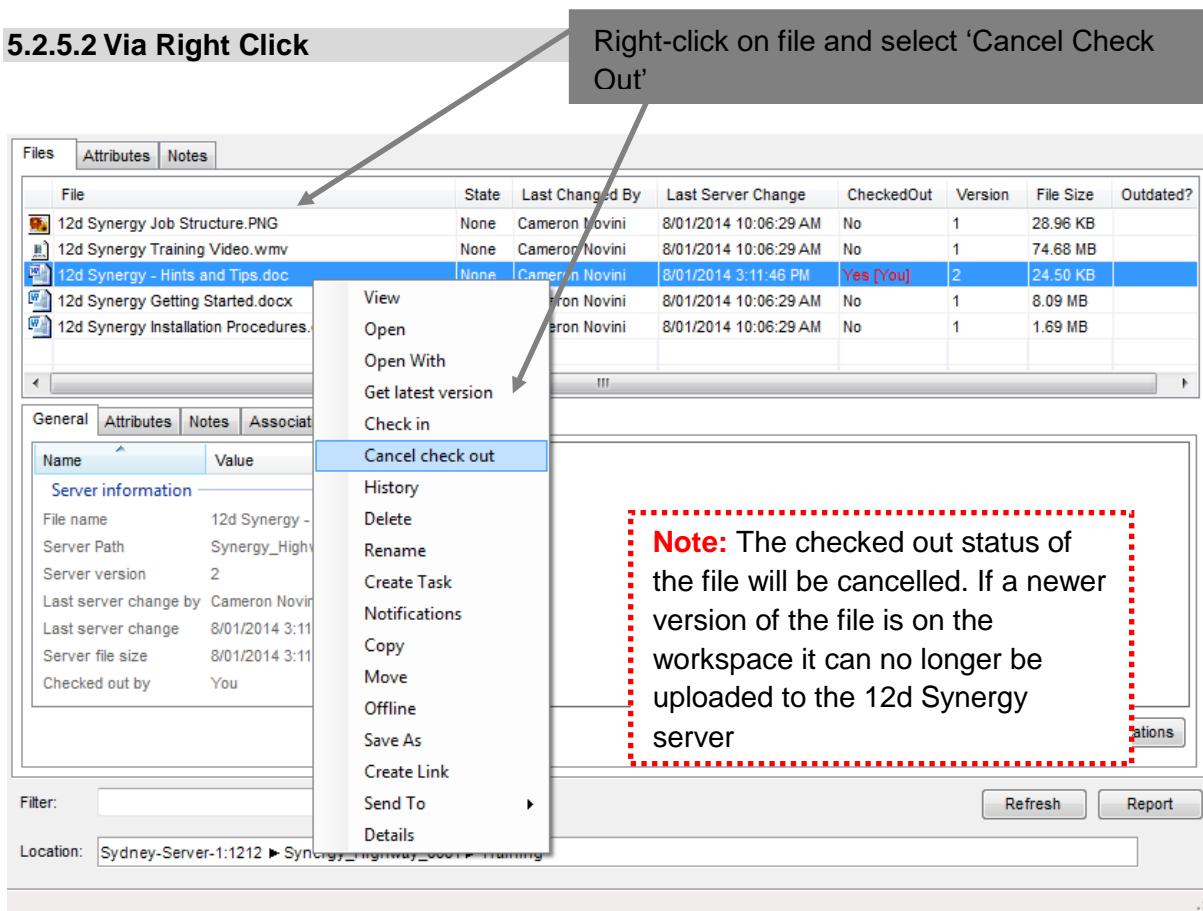
## 5.2.5 Cancelling a Check Out

If you no longer need to edit a file and wish to discard your changes, the check out on a file can be cancelled. There are several mechanisms to perform this operation.

### 5.2.5.1 Via the Ribbon Bar



### 5.2.5.2 Via Right Click





## 5.2.6 Adding a File

There are several ways to add files from the file system to 12d Synergy.

### 5.2.6.1 Via the Ribbon Bar

Click 'Add file' icon

Select desired file

Click to 'Open' file

Select 'Copy file(s)' or 'Move'

**IMPORTANT:**

'Copy file' will copy but also leave the file on the hard drive.

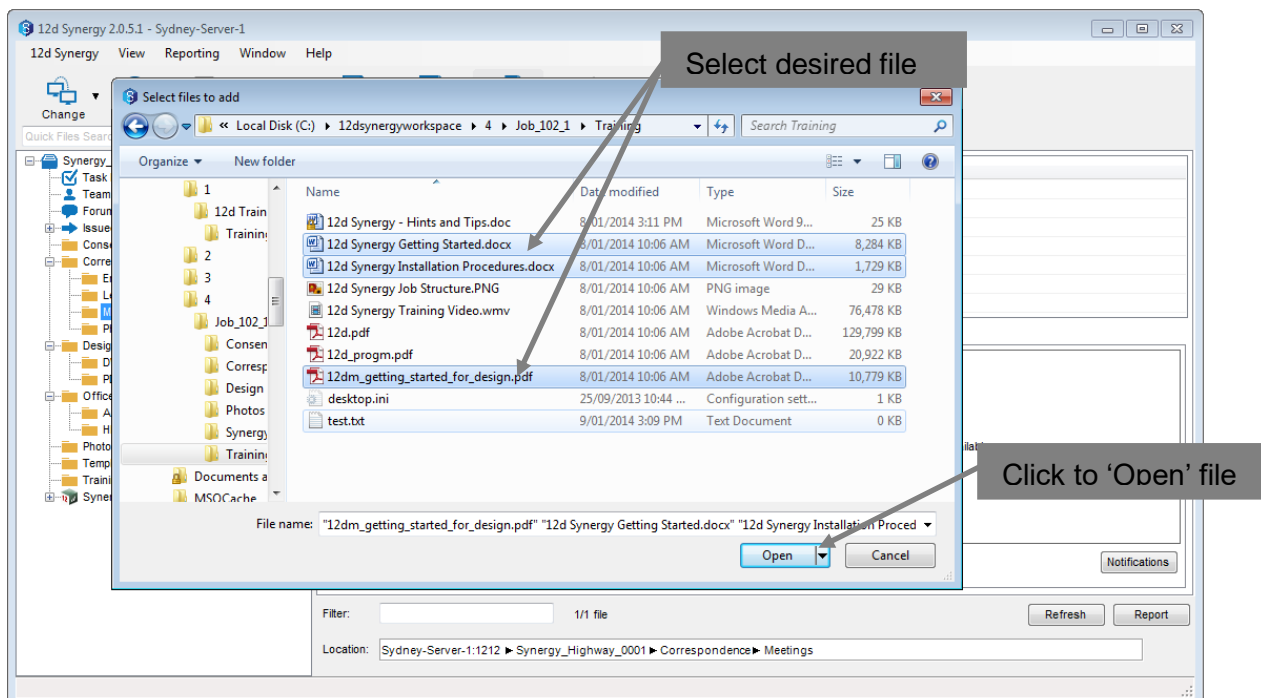
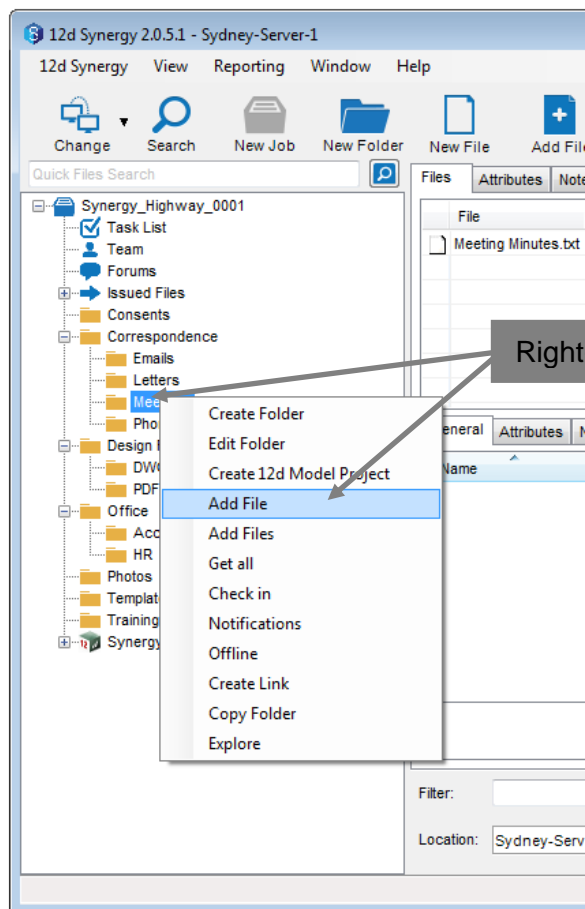
'Move file' will move the file and delete it from the hard drive.

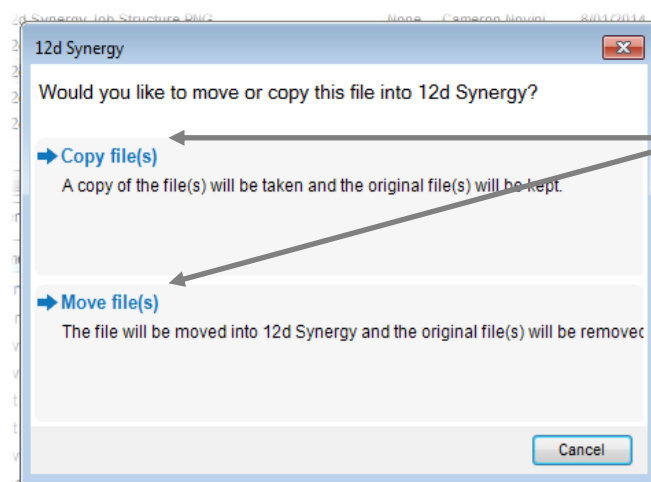
Type in description for this action/change

6. Click 'Submit'

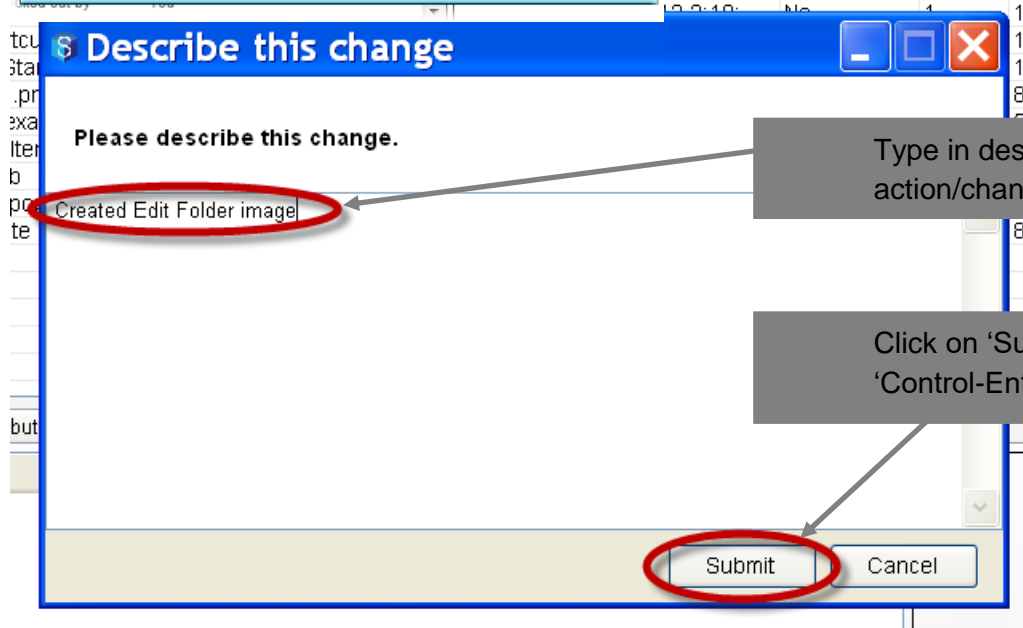


### 5.2.6.2 Via Right Click Context Menu





5. Select 'Copy file(s)' or 'Move file(s)'

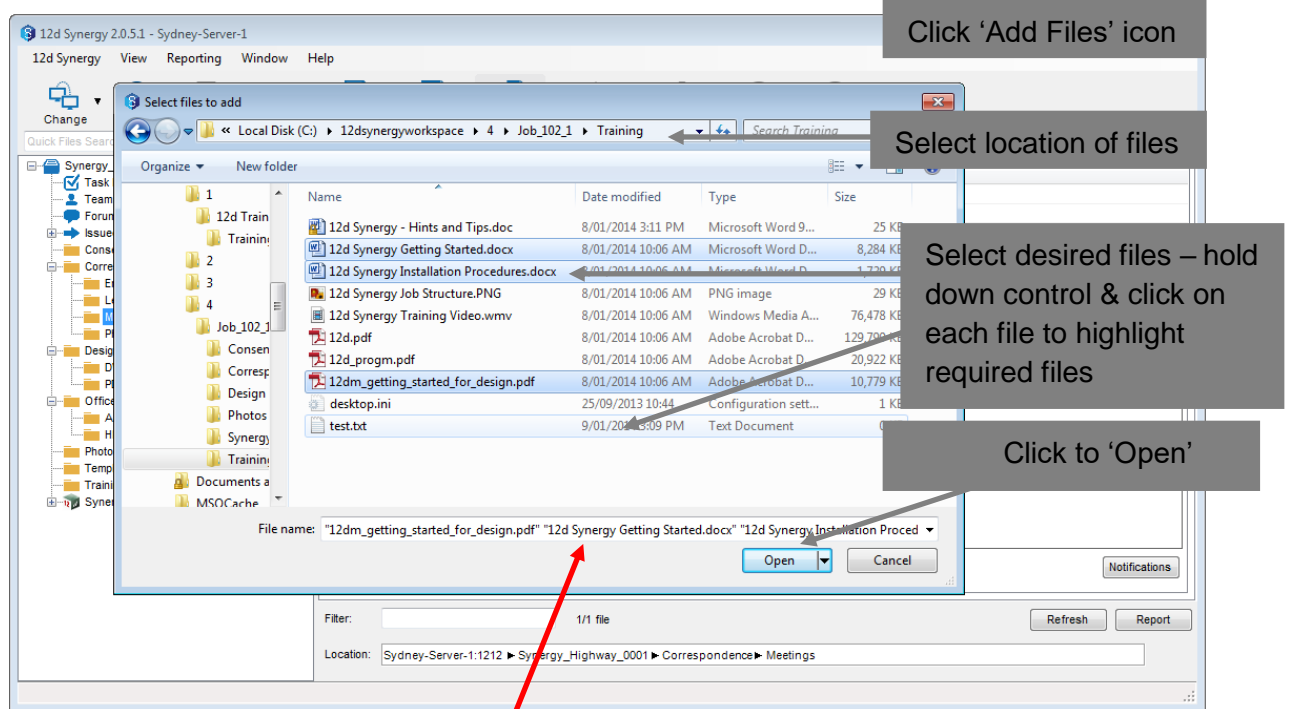


Type in description for this action/change

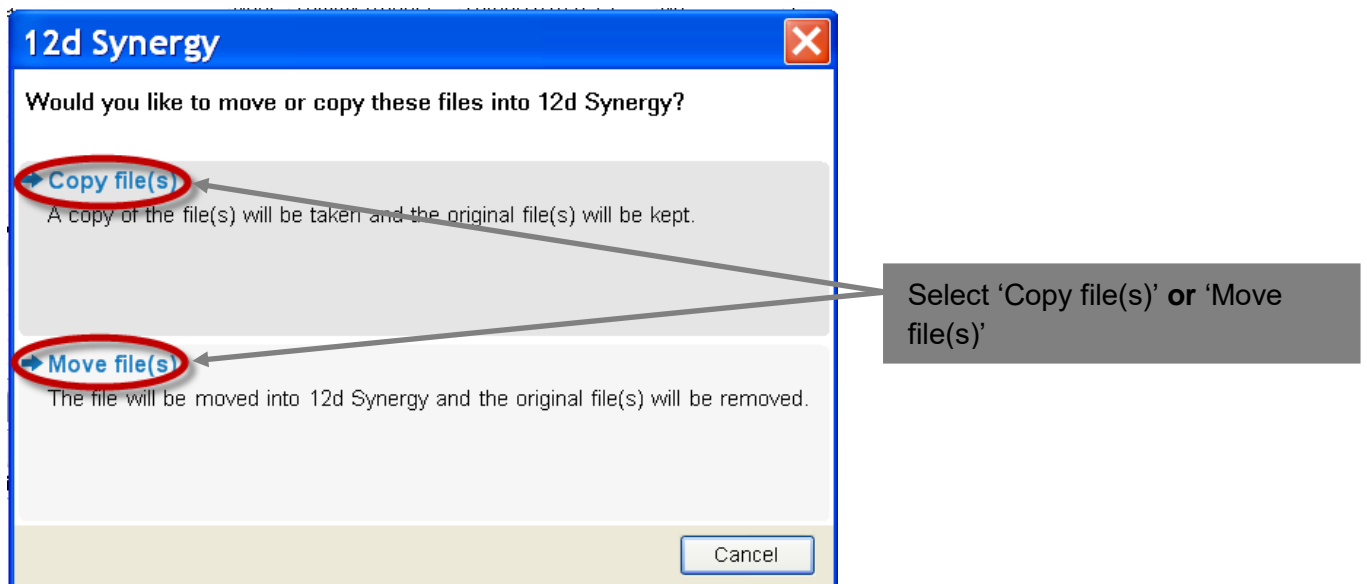
Click on 'Submit' or press 'Control-Enter'



### 5.2.6.3 Adding Multiple Files Via the Ribbon Bar



**NOTE:** All selected files will be displayed in the 'File name' field



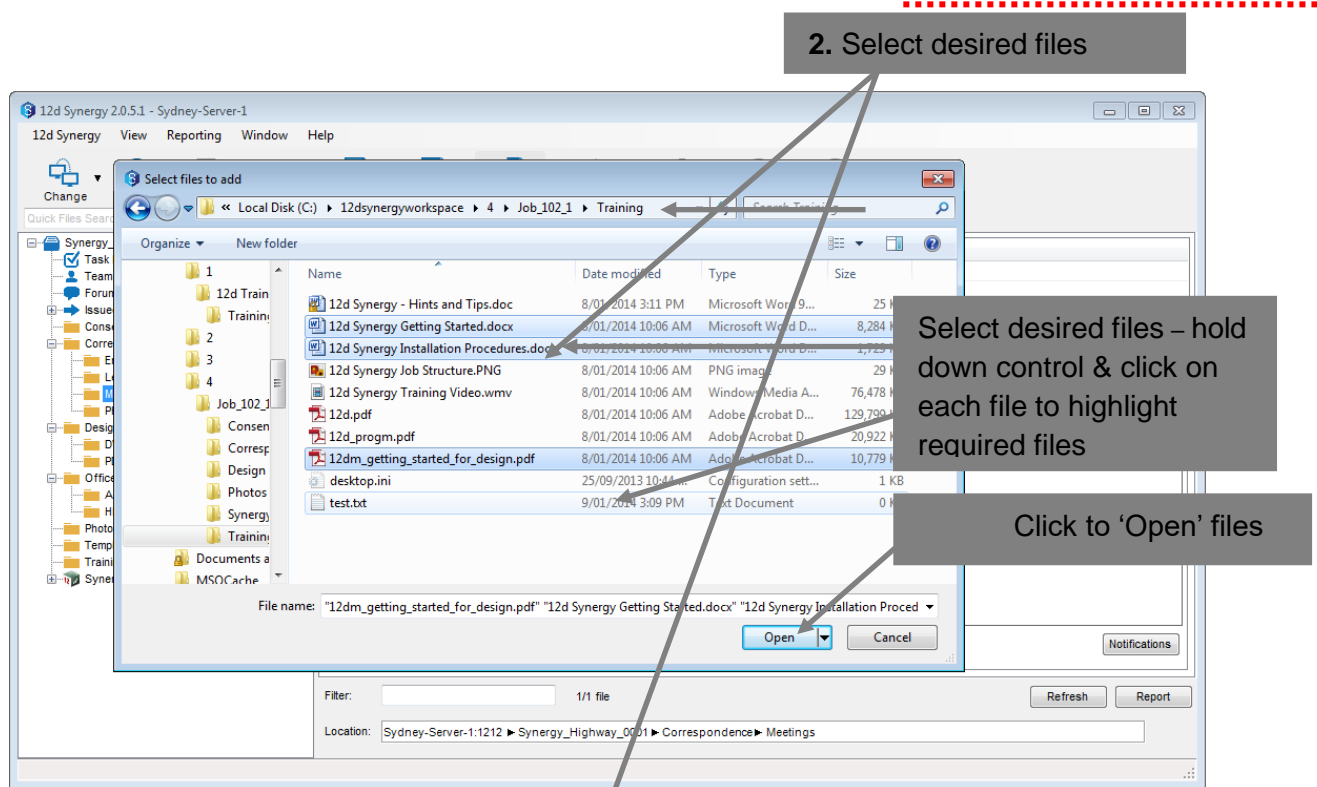
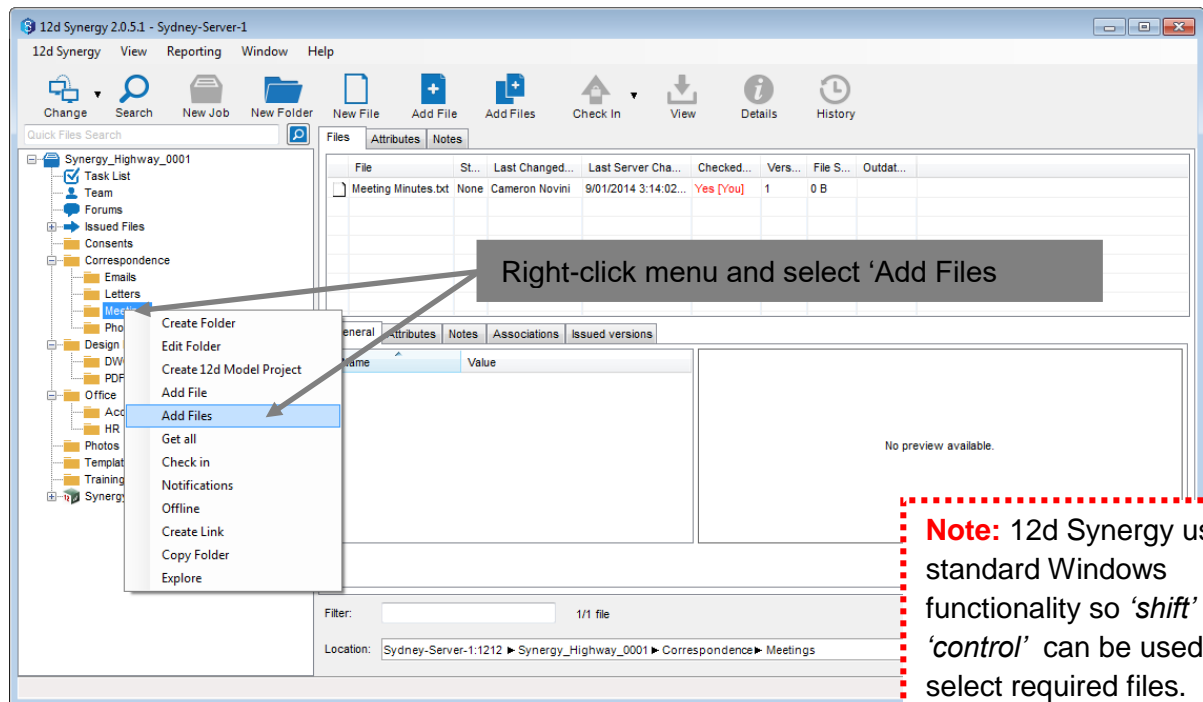
**IMPORTANT:**

**'Copy file (s)'** - will copy but also leave the file on the hard drive.

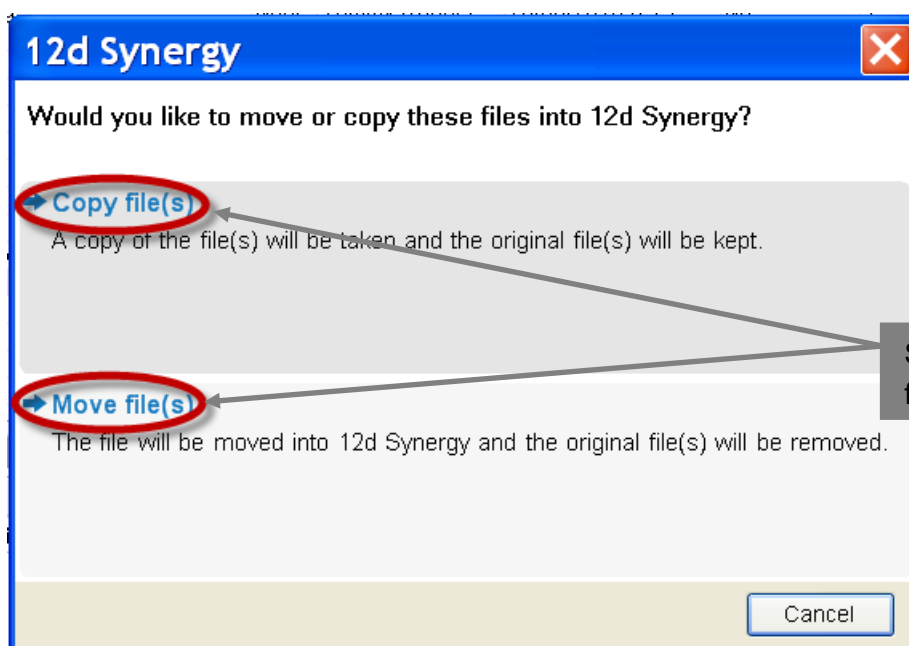
**'Move file(s)'** - the file will only exist within 12d Synergy.



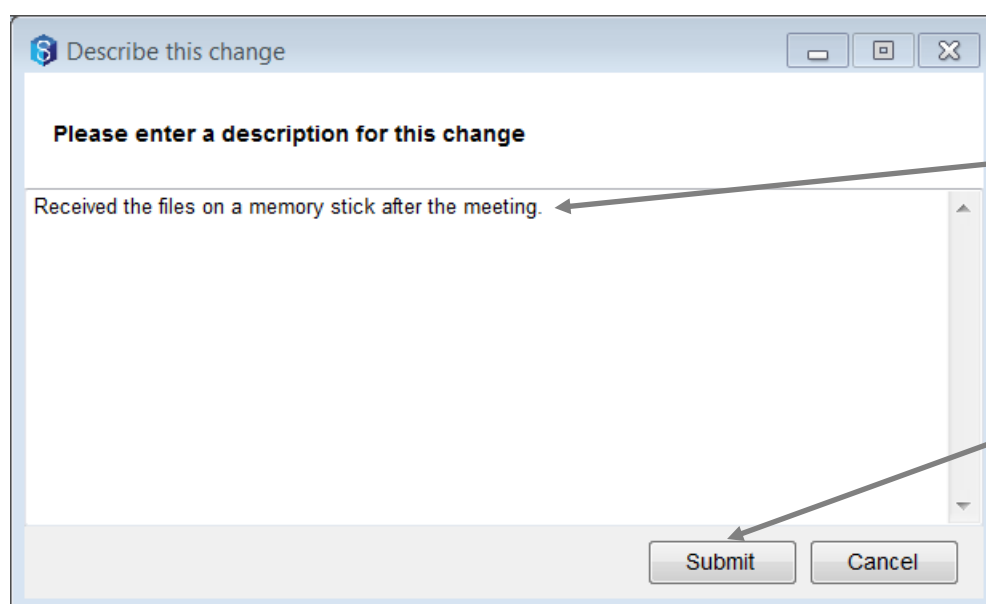
### 5.2.6.4 Via the Right Click Context Menu



**NOTE:** All selected files will be displayed in the 'File name' field



Select 'Copy file(s)' or 'Move file(s)'



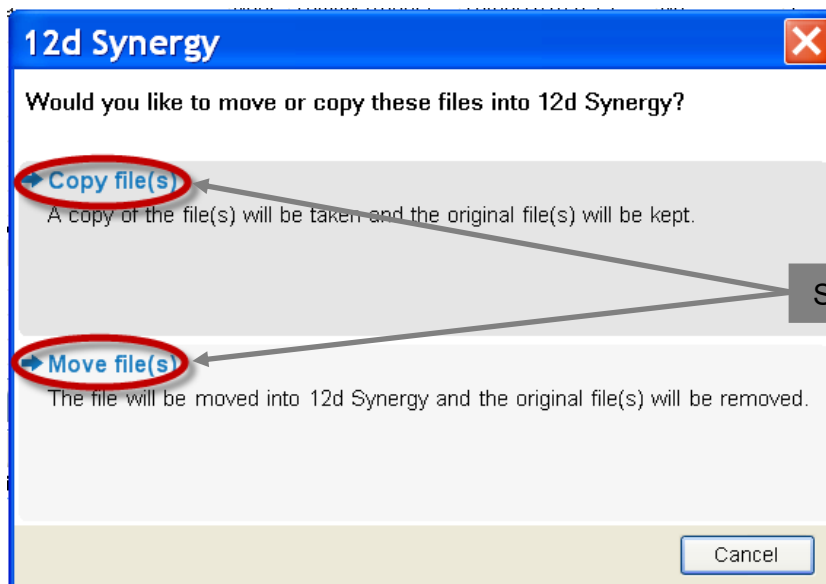
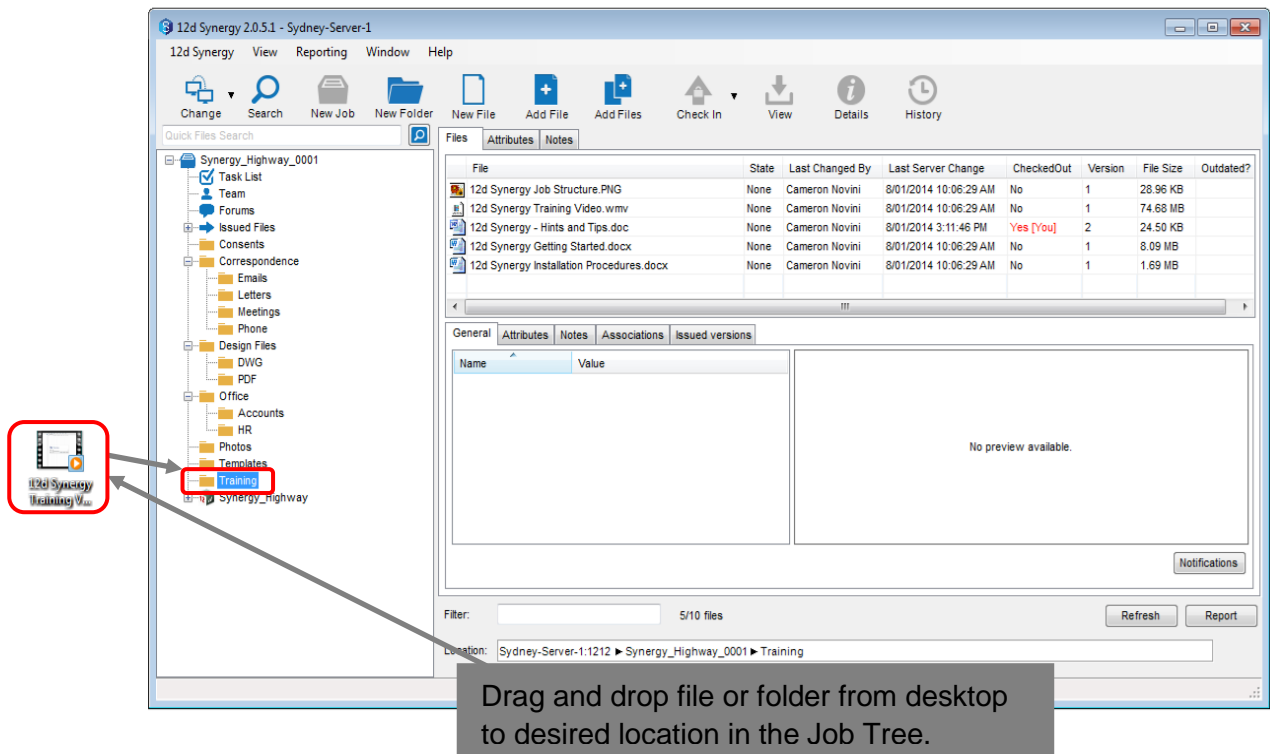
Type in description for this action / change

6. Click on 'Submit'





### 5.2.6.5 Via Drag and Drop From Windows



#### IMPORTANT:

**'Copy file (s)'** - will copy but also leave the file on the hard drive.

**'Move file(s)'** - the file will only exist within 12d Synergy.



A screenshot of a 'Describe this change' dialog box. The dialog has a title bar with a blue 'S' icon and the text 'Describe this change'. Inside, there is a text area with the text 'The Video was provided by 12d after attending the 12d Synergy Getting Started training session'. At the bottom, there are 'Submit' and 'Cancel' buttons.

Type in description for this action / change

4. Click on 'Submit'



## 5.2.7 Creating Files

Click 'New File' icon

Select type of file from drop down options – MS Word, MS Excel, other file\* (\* 'create from other file' allows you to use another file as a starting template)

Enter name of new file

Click to 'Create'

File	State	Last Changed By	Last Server Change	CheckedOut	Version	File Size	Outdated?
12d Synergy Job Structure.PNG	None	Cameron Novini	8/01/2014 10:06:29 AM	No	1	28.96 KB	
12d Synergy Training Video.wmv	None	Cameron Novini	8/01/2014 10:06:29 AM	No	1	74.68 MB	
12d Synergy - Hints and Tips.docx	None	Cameron Novini	8/01/2014 3:11:46 PM	Yes [You]	2	24.50 KB	
12d Synergy Getting Started.docx	None	Cameron Novini	8/01/2014 10:06:29 AM	No	1	8.09 MB	
12d Synergy Installation Procedures.docx	None	Cameron Novini	8/01/2014 10:06:29 AM	No	1	1.69 MB	

**Describe this change**

Please describe this change.

Type in description (e.g. reason for creating new file).

Click on 'Submit'

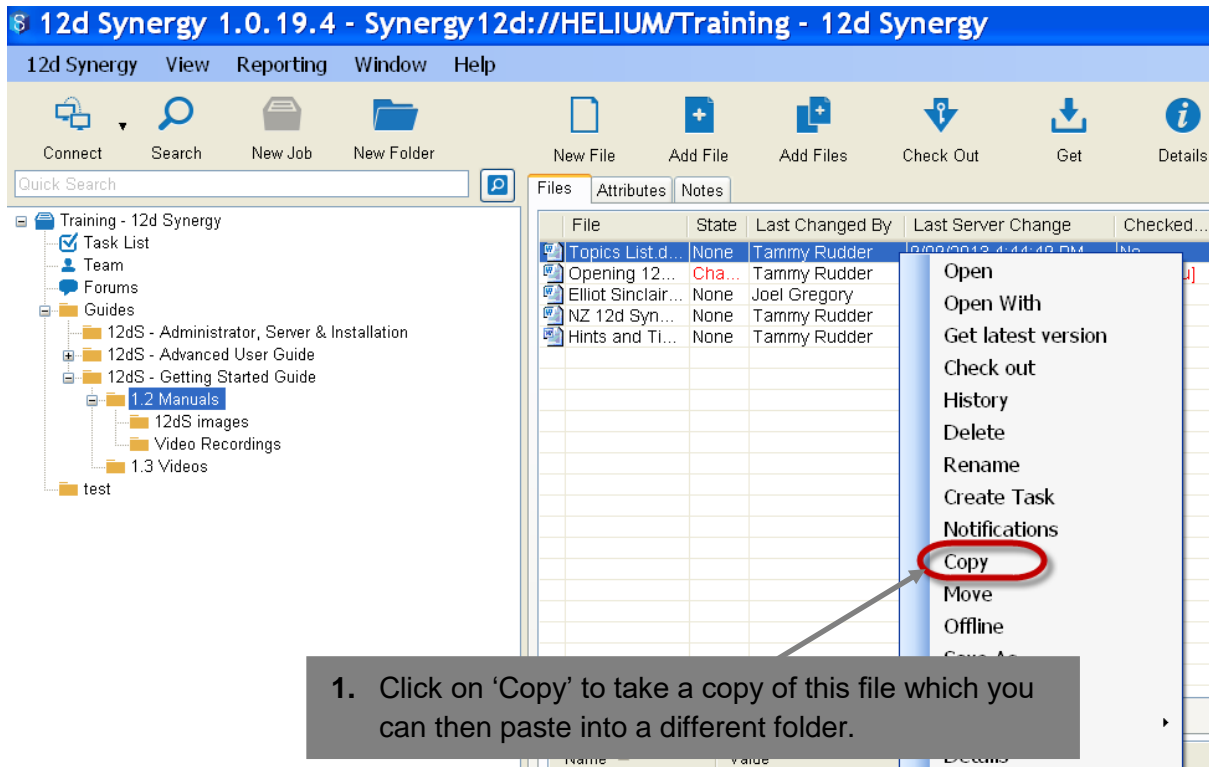
Submit Cancel



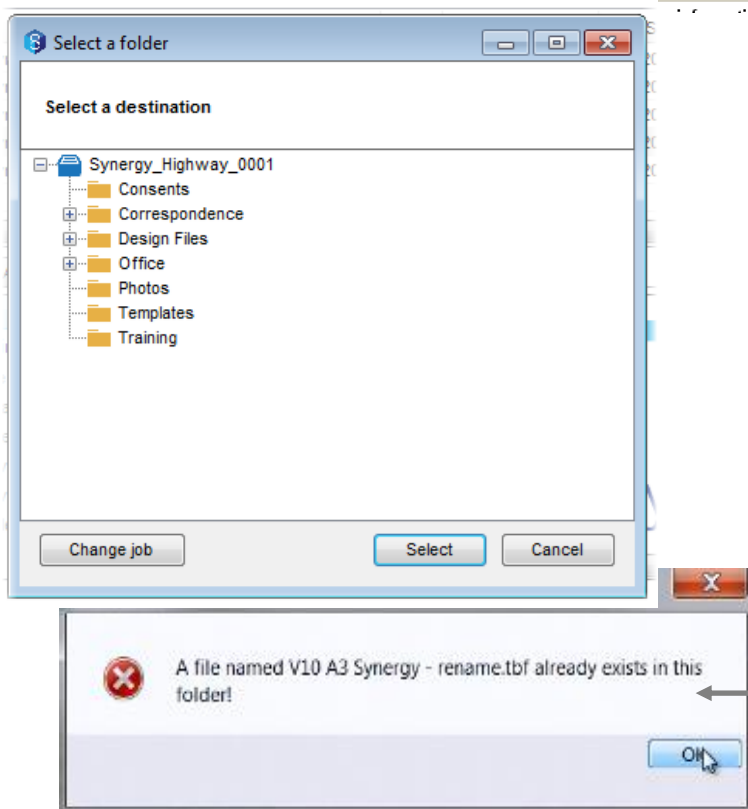
## 5.2.8 Copying, Moving or Linking files

### 5.2.8.1 Copying a file

Like in windows explorer, copying a file creates a duplicate copy of the file in another folder.



1. Click on 'Copy' to take a copy of this file which you can then paste into a different folder.



2. Select your destination folder from the list. Expand using the '+'. You cannot make an extra copy of the file in the current folder; a new folder must be selected.

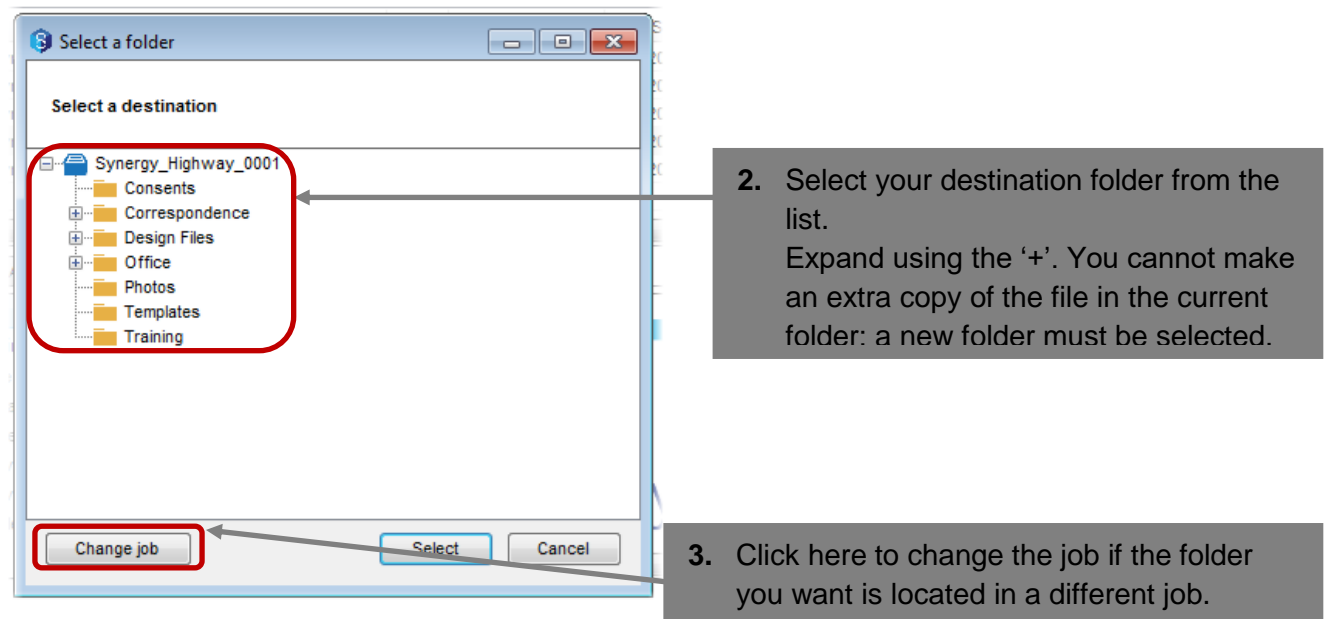
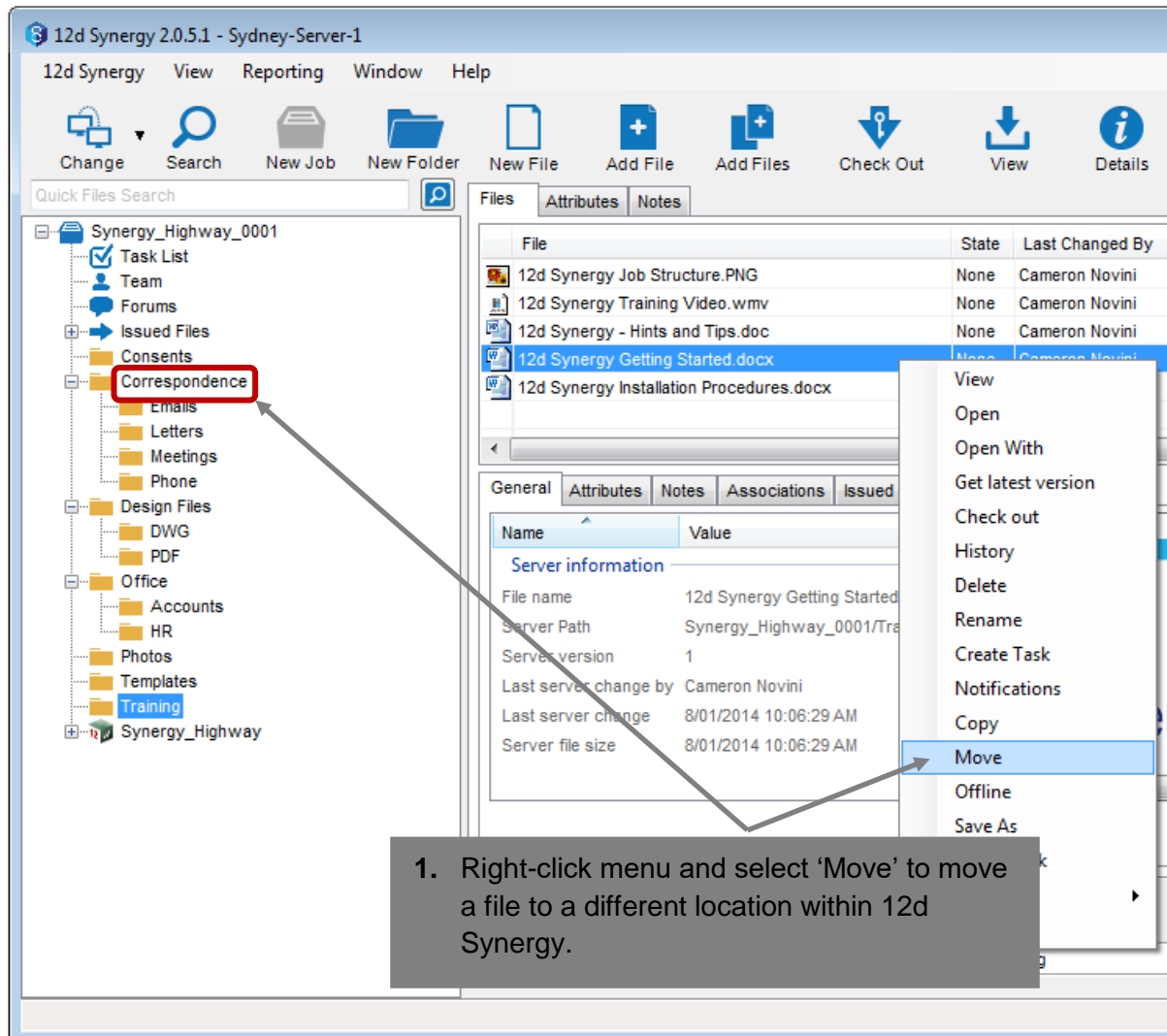
3. This warning will appear if there is already a file with that name in your selected folder.

4. Click here to change the job if the folder you want is located in a different job.



### 5.2.8.2 Moving a file

Moving a file to a different location within 12dSynergy is similar to copying, but the original file is not kept in the original location.





### 5.2.8.3 Linking Files

A linked file creates a mirror image of the file somewhere else. This means that whenever you access the Linked copy of the file, you will always get the up-to-date version – every time you change the original file, the linked file changes too.

Note that you can only check out the original copy of the file; you cannot edit the linked file.

**What would you like to do with this file?**

➔ **Copy file(s)**

A copy of the file(s) will be taken and the original file(s) will be kept.

➔ **Move file(s)**

The file will be moved into its new location.

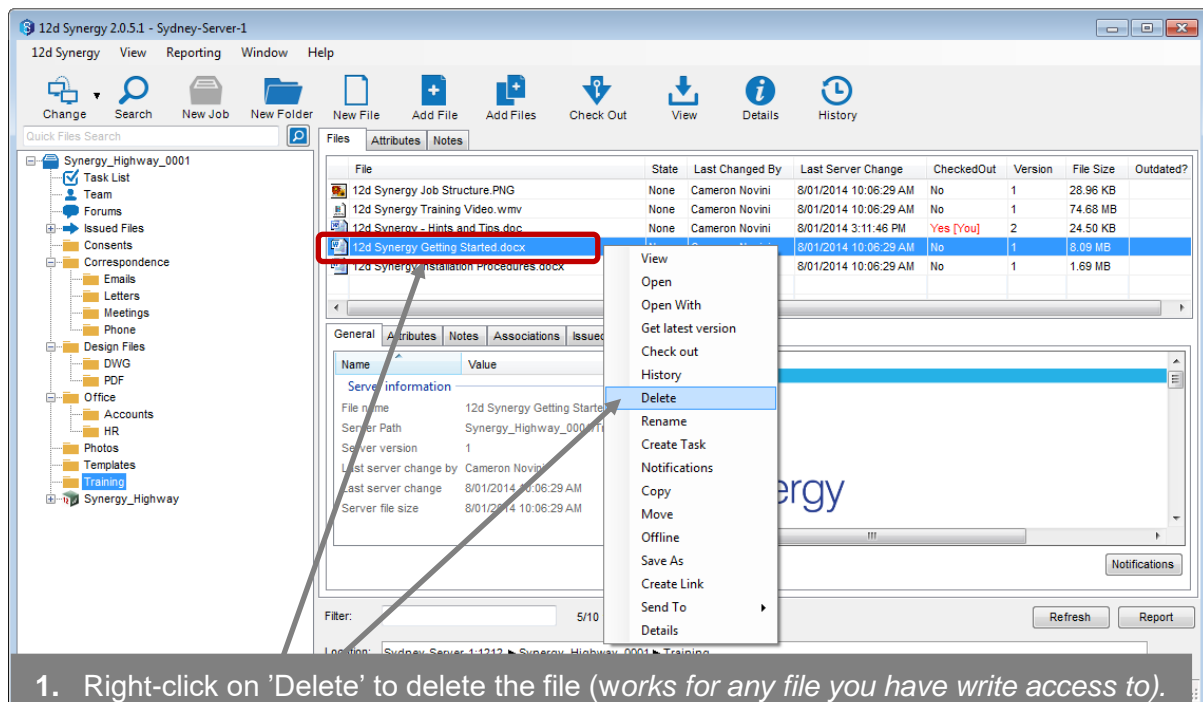
➔ **Link file(s)**

The file will be left in its original location and a linked file will be created

Cancel

### 5.2.9 Deleting Files

Files are generally not permanently removed from 12d Synergy unless required by a System Administrator. In most cases, they are 'marked' as deleted, which renders them invisible until you restore the file or choose to view deleted files. This ensures information can never be accidentally lost.

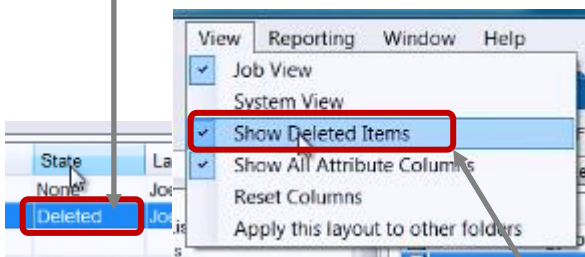


1. Right-click on 'Delete' to delete the file (works for any file you have write access to).

*This is not a permanent deletion. Only a user with rights to do so may permanently delete, or 'purge' a file/files (purging will be explained in the Advanced Guide).*



2. After you have selected 'Delete' the 'State' column will show 'Deleted'.



3. If you do not wish to see files that have been deleted, you can adjust this setting by clicking on the 'View' icon on the ribbon bar then deselect 'Show Deleted Items'.

**NOTE:** You can't create a new file in the same folder with the same name as the deleted file. This is so the History will make sense when being reviewed.

## 5.2.10 Finding Files

There are several ways to search files, either via a quick search or a more complex, custom search.

### 5.2.10.1 Search – Quick-Search

Ensure you have the correct folder selected, because the search feature is designed to look within a particular folder.

1. Type your search word (part of the file name or, in some cases, a word contained in the file) into the search bar.

2. Click the Quick Search

Name	Value
<b>Server information</b>	
File name	12d Synergy Getting Started.docx
Server Path	Synergy_Highway_0001/Training/12d ...
Server version	3
Last server change by	Cameron Novini
Last server change	9/01/2014 4:22:13 PM
Server file size	9/01/2014 4:22:13 PM

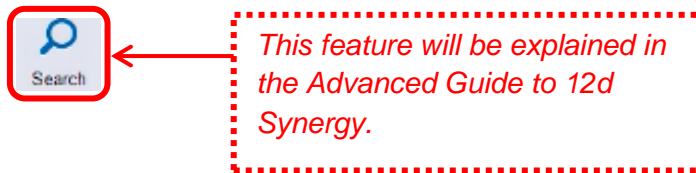
Filter: 1/1 file

Location: Sydney-Server-1:1212 ► Synergy\_Highway\_0001 ► Training



### 5.2.10.2 Custom Search

Clicking the Search button on the ribbon bar at the top of the 12d Synergy screen provides advanced or custom search features:







## 5.2.11 Viewing Detailed File Information

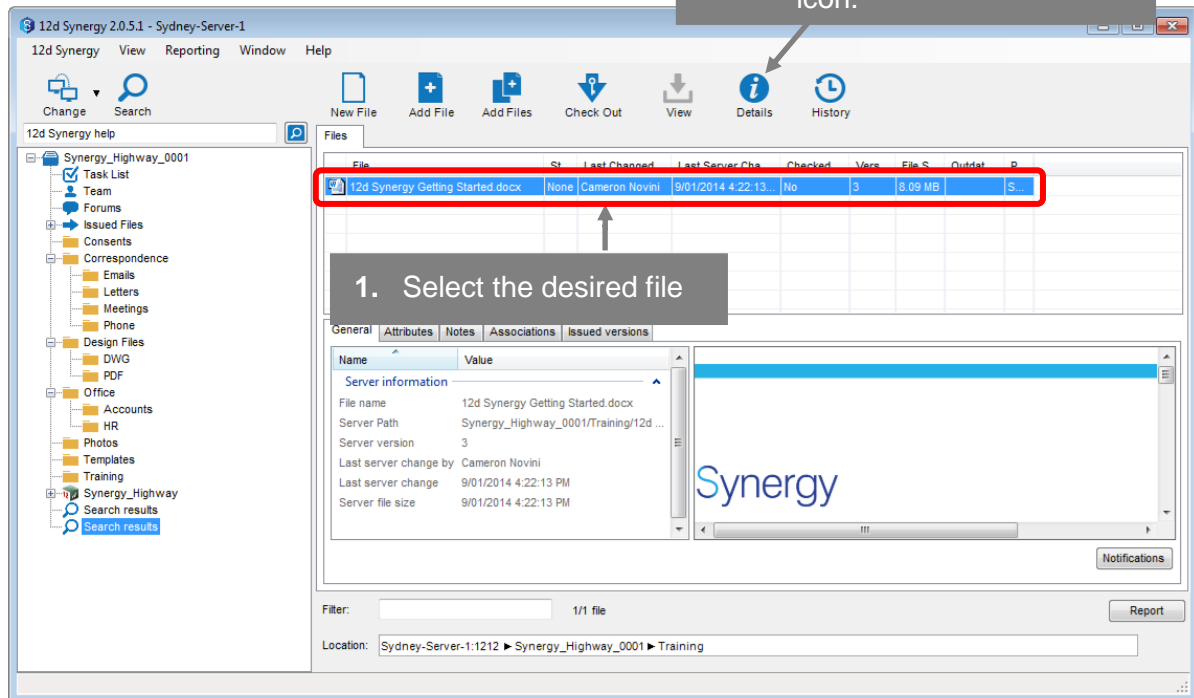
Individual files in 12d Synergy have a lot of detailed information.

This includes things like

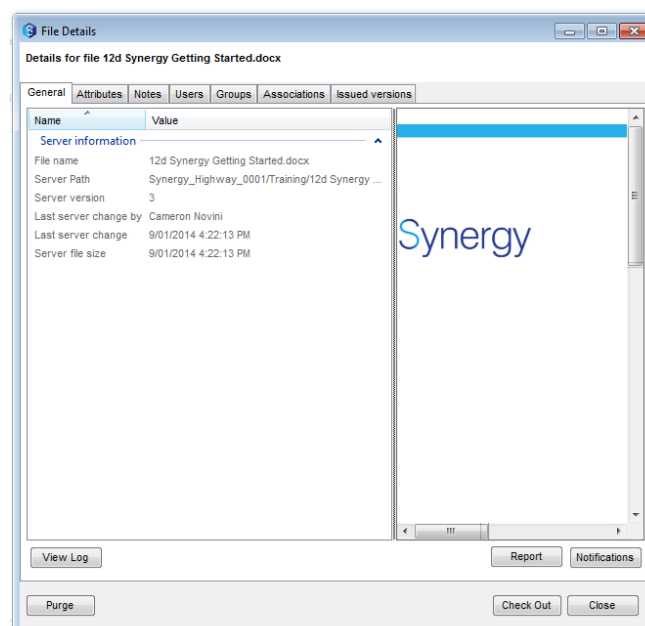
1. What state the file is in
2. Who last changed it
3. When the file was created
4. Attributes
5. Notes

Follow the steps below to access this information:

2. Click on the 'Details' icon.



3. File Details panel appears, displaying information about the



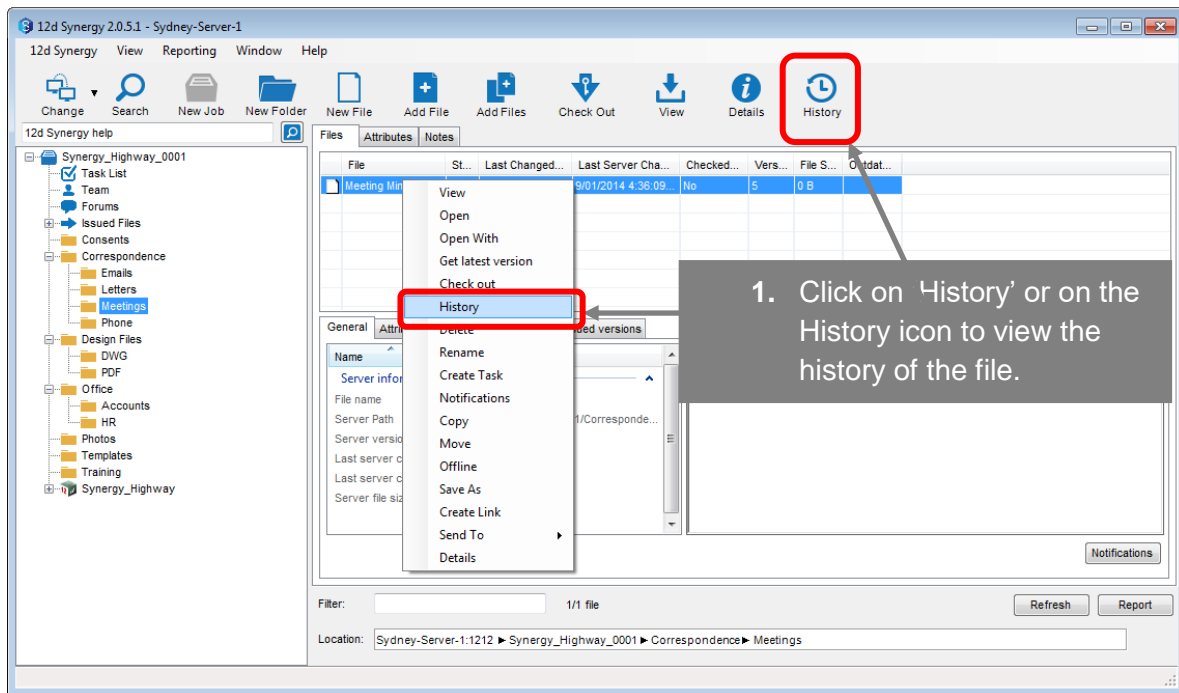


### 5.2.12 View files located on your Workspace

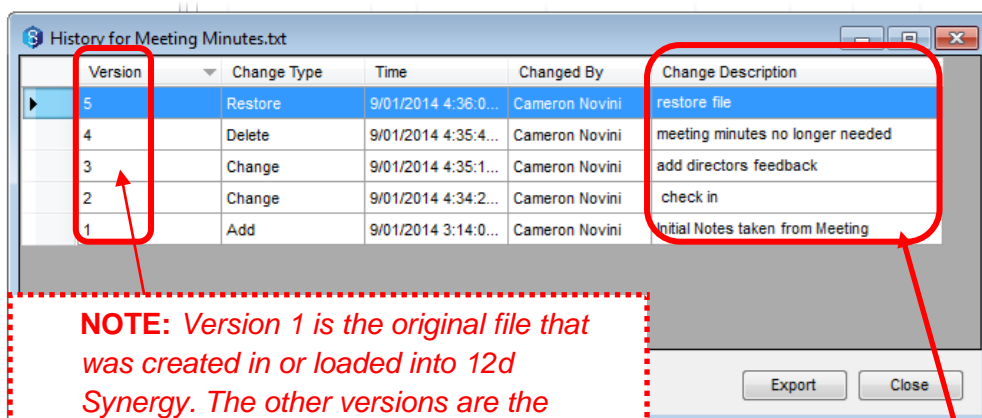
Right click on a folder and select 'Explore', Windows Explorer will open up pointing to the folder location on the 12d Synergy workspace.

### 5.2.13 Viewing File History

12d Synergy keeps track of all changes to a file, which can be reviewed at a later date. Any time you change a file, you will be prompted to describe what you have done, and along with any system defined attributes that might need to be filled out. This information can then be used to see how the file has changed over time. You can even load a previous version of a file.



The following panel will appear (items in descending order):



**NOTE:** Version 1 is the original file that was created in or loaded into 12d Synergy. The other versions are the subsequent versions in order from newest to oldest (top to bottom). These versions are available to be restored if the newest version is deemed incorrect.

Descriptions of changes can be viewed.



### 5.2.15 Reference Tracking

Some documents reference other documents – a common example is a DWG file that uses XREFS, or an Excel workbook that references another one. It is important that you know that when you are working with a file, you are always working with the latest versions of these referenced files.

12d Synergy can provide reference tracking for known file types automatically, or it can be configured manually.

For more information, please see the Advanced User Guide.

### 5.2.16 Notes

Notes can also be attached to files, along with many other entities within 12d Synergy. To see information on how to add or read notes, please see Notes Section.

### 5.2.17 Associations

Files or folders can be associated with other items within the system, such as other files, tasks, other jobs and so on. This is a handy way of saying that a file is in some way related to something else.

For more information, please see the Advanced User Guide.

### 5.2.18 Attributes

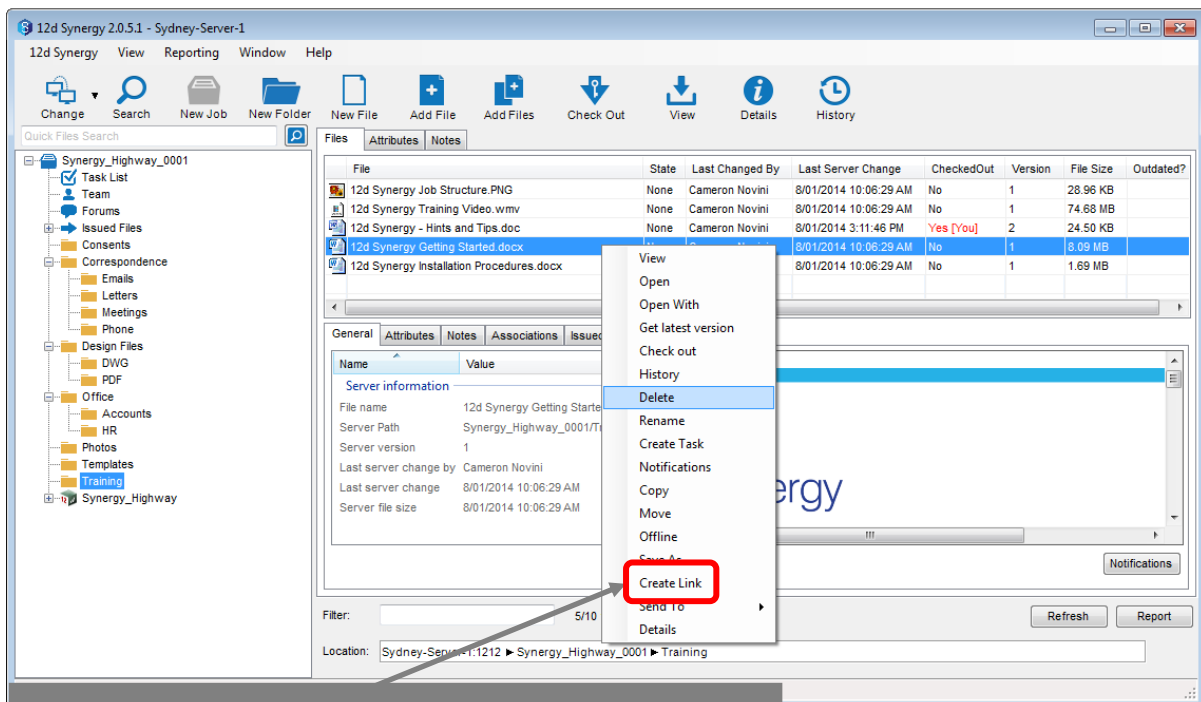
Files or folders can have additional information attached as 'Attributes'. A good example is the Subject, Sender, and Receive Date and so on for an email. Custom attributes can also be attached to help describe files in ways that make sense for your job, and can be used in searching.

For more information on Attributes, please see the Advanced User Guide.



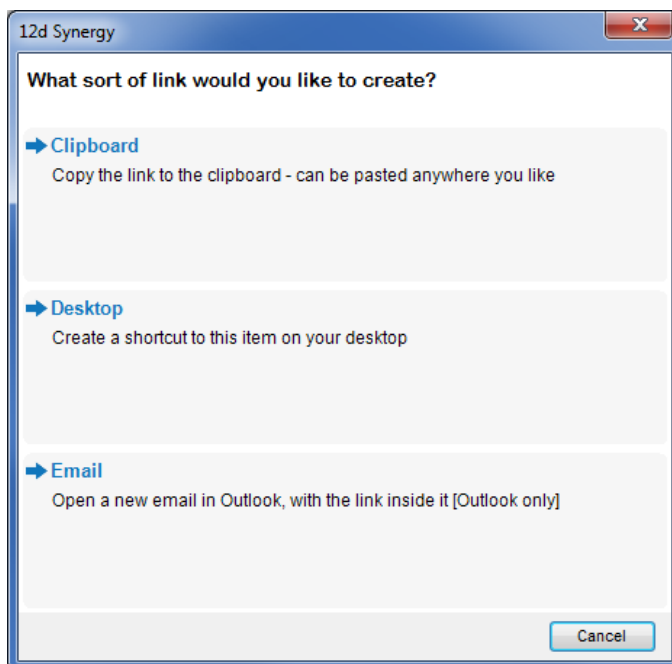
## 5.2.19 Links to Files

12d Synergy can give you shortcut links to files or other items so that you can get to them quickly, and can help you send these to other people to identify items for them to look at.



Click 'Create Link' to prepare a link. This allows you to send yourself or someone else a link so they can directly open the file in 12d Synergy rather than having to navigate to it.

12d Synergy will then ask if you wish to place this on the clipboard to paste into another application, to save a shortcut item to your desktop or to create a new email for you to send with email.





### 5.2.20 Managed Folders

12d Synergy has a unique feature called a Managed Folder. Some applications may work with a whole folder of files, rather than an individual file. In this case, they may be required to be checked out together. Managed folders allows you to treat a folder of files as a distinct entity in its own right; checking one file out means all files are checked out.

Likewise, when checking a managed folder back in, 12d Synergy can automatically detect which files have been changed, added or deleted.

For more information on managed folders, please see the advanced guide.

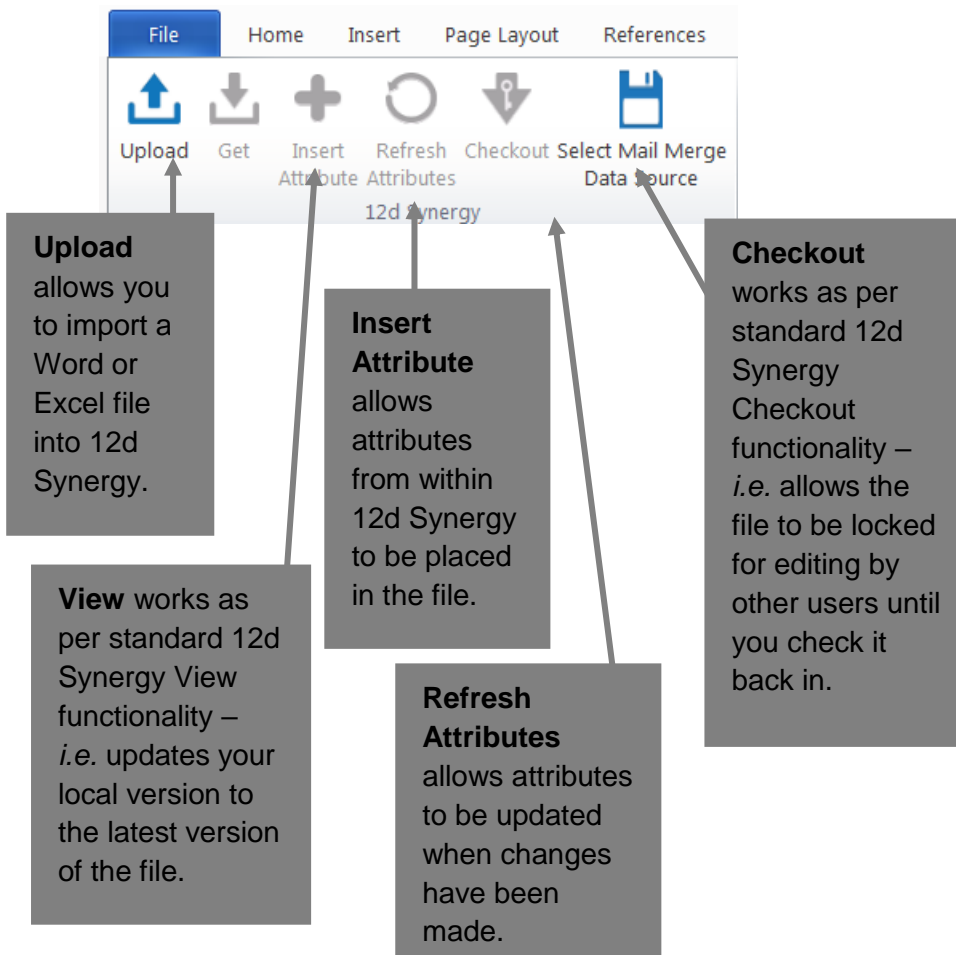


## 5.3 Working with Files in Other Applications

### 5.3.1 Microsoft Word and Excel 2010 and Later

12d Synergy allows easy interface with Microsoft Word and Microsoft Excel (2010 and later). The plug-ins for these two programs works very similarly, so they will be described together in this section.

This is the Word/Excel plug-in menu:



#### 5.3.1.1 Checking Files In

When you have finished working on your file, simply click 'Upload'. If this is a new file, you will be prompted as to where you would like to save it, otherwise it will be checked in for you.

You can also choose to keep the file checked out afterwards.

#### 5.3.1.2 Checking Files Out

To check a file out that you have opened from 12d Synergy, simply click the 'Checkout' button.

#### 5.3.1.3 Inserting Attributes

You can insert attributes from 12d Synergy into Word and Excel documents. For example, you may wish to include the clients name in your document.

To do so, click the Insert Attribute button. Any job, folder or file attribute in the current file location will be available to you.



Note that every time the attribute is updated in 12d Synergy, your document will also be updated to reflect the latest changes.

### **5.3.2 Outlook**

Please see the section on Email Management.

### **5.3.3 BricsCAD and AutoCAD**

#### **5.3.3.1 Inserting XRefs**

You can reference DWGs stored in 12d Synergy as XREFs.

Simply select the 'Insert XREF' option on the 12d Synergy menu. You will be able to select where in 12d Synergy the reference DWG is and fill out any standard options for placement, as per the standard XREF window in your CAD program.

#### **5.3.3.2 Inserting Attributes**

You can insert attributes from 12d Synergy into your drawings as mtext. For example, you may wish to include the clients address in your DWG.

To do so, click the Insert Attribute option on the 12d Synergy customisation menu. Any job, folder or file attribute in the current file location will be available to you.

Note that every time the attribute is updated in 12d Synergy, your drawing will also be updated to reflect the latest changes.

### **5.3.4 12d Model**

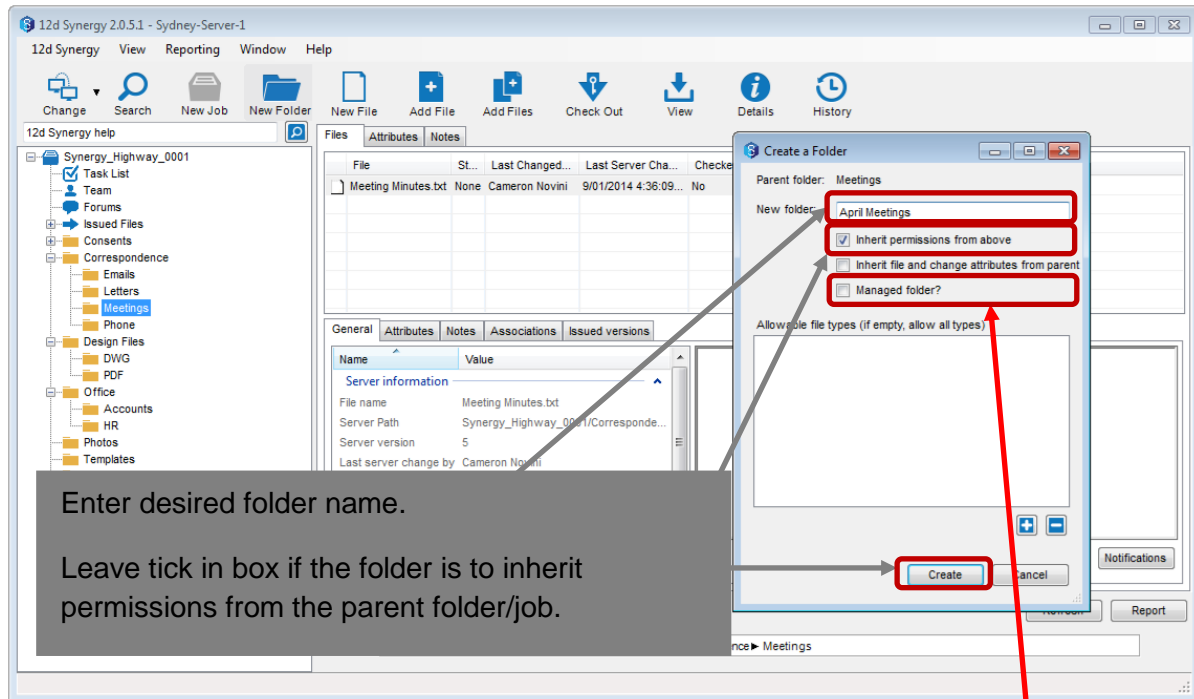
Please see the Working with 12d Synergy and 12d Model guide.



## 5.4 Working with Folders in 12d Synergy

### 5.4.1 Creating Folders

Folders can be created directly inside a job, or inside another folder. They can be created by clicking 'New Folder' on the ribbon bar, or by right clicking the desired destination and selection 'Create Folder'



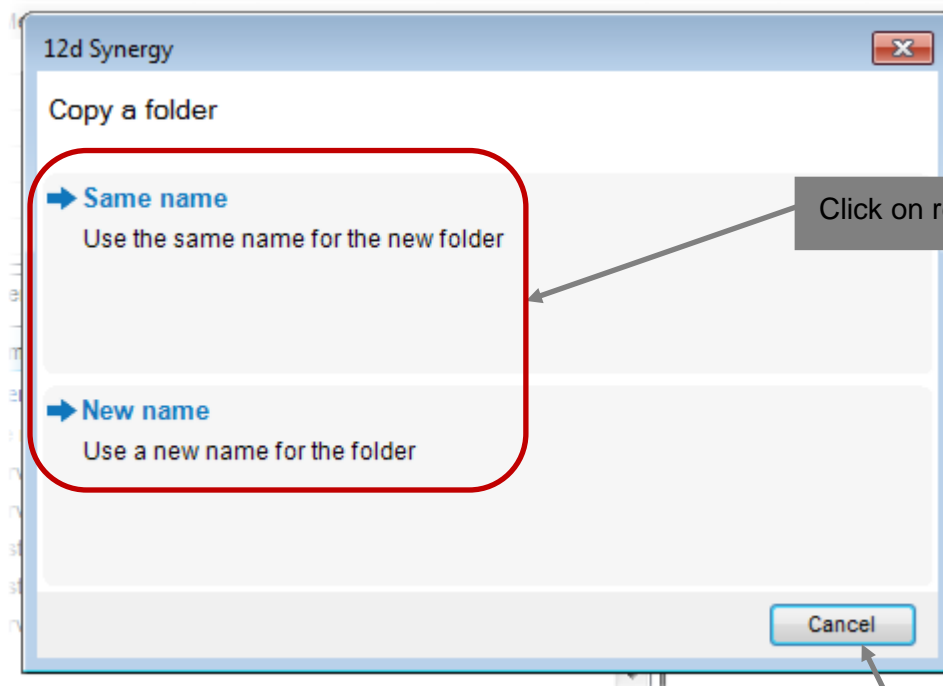
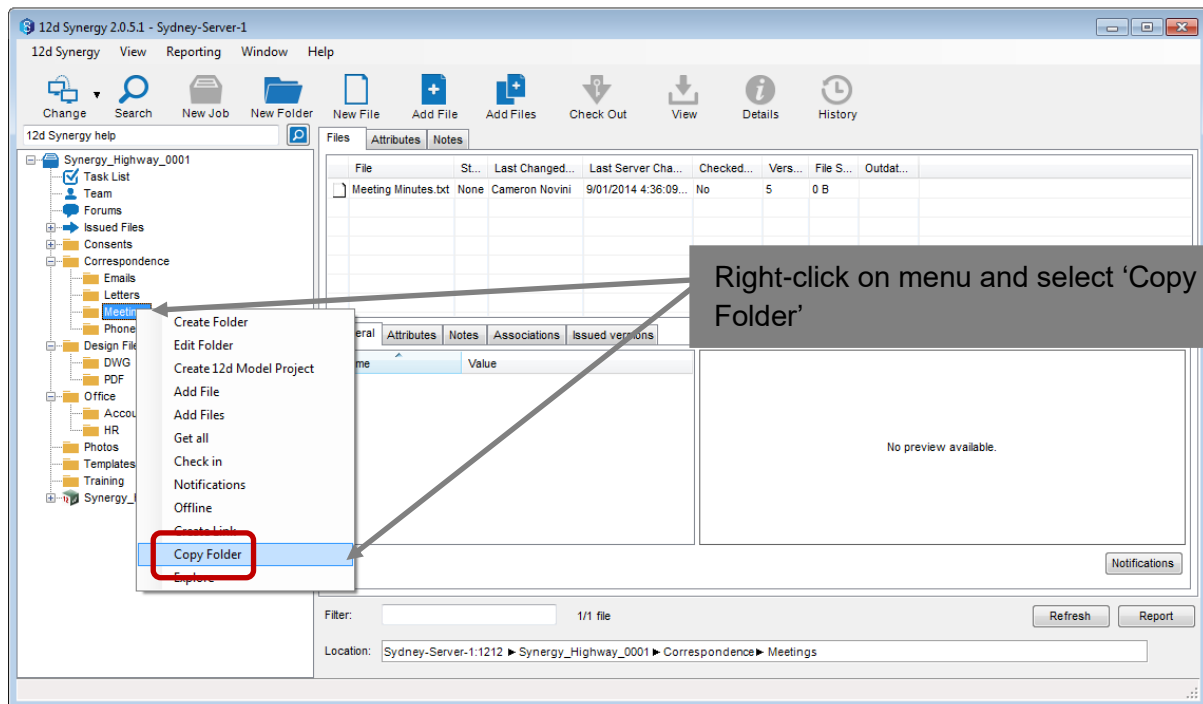
The newly created folder will be displayed within the Job or Sub-Job.

'Managed Folders' will be explained in detail in the Advanced Guide. At this level, we just need to know that making a Managed folder means the files in that folder will be treated as a group, so will be automatically checked out and in together, as well as updated to the latest versions as a group. This can be a very good time-saver if you have a group of files that are always accessed simultaneously.





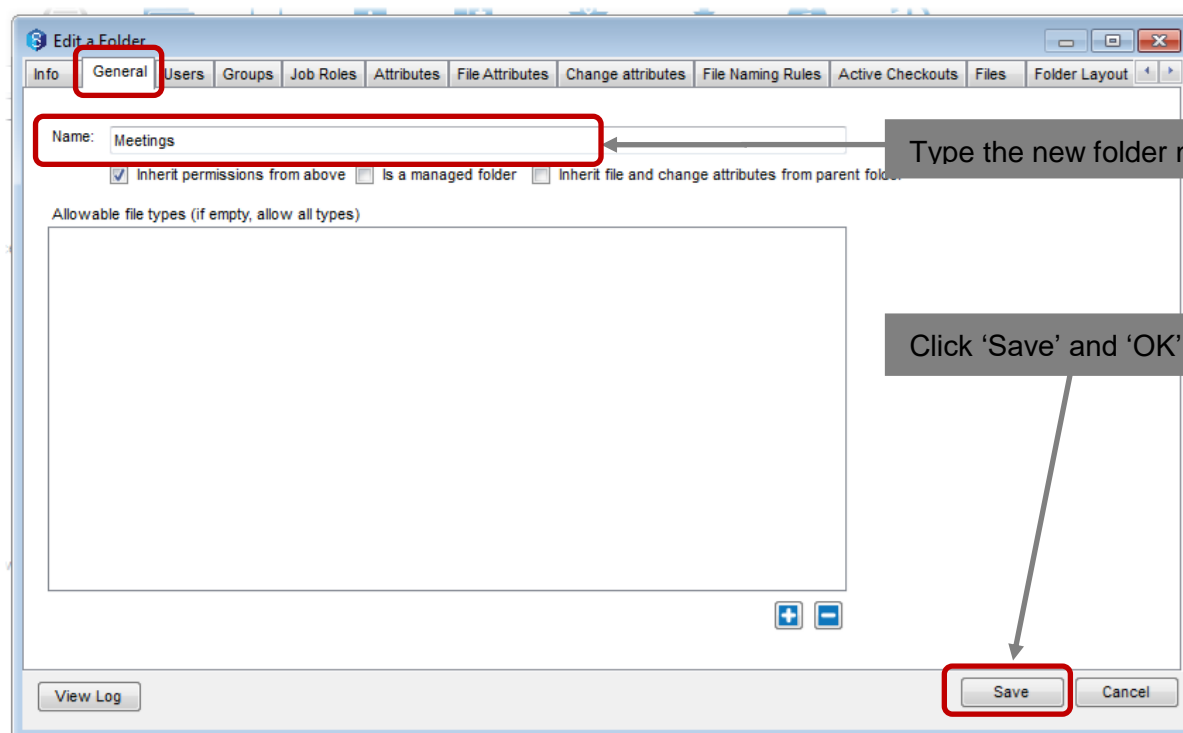
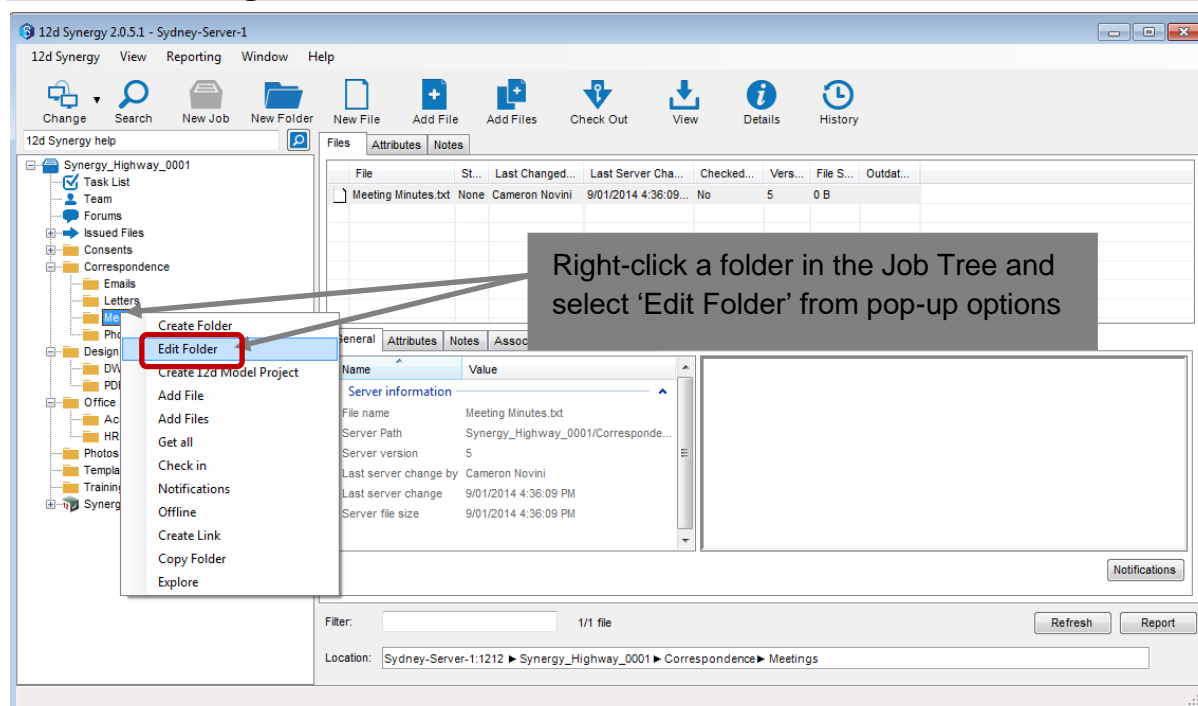
## 5.4.2 Copying or Moving Folders



**Note:** Click on 'Cancel' if you do not want to proceed



### 5.4.3 Renaming a folder



### 5.4.4 Notes

Notes can also be attached to files, along with many other entities within 12d Synergy. To see information on how to add or read notes, please see the section on notes.



## 5.4.5 Associations

Folders can be associated with other items within the system, such as files, other folders, tasks, other jobs and so on. This is a handy way of saying that a file is in some way related to something else.

Please see the Advanced User guide for information on associations.

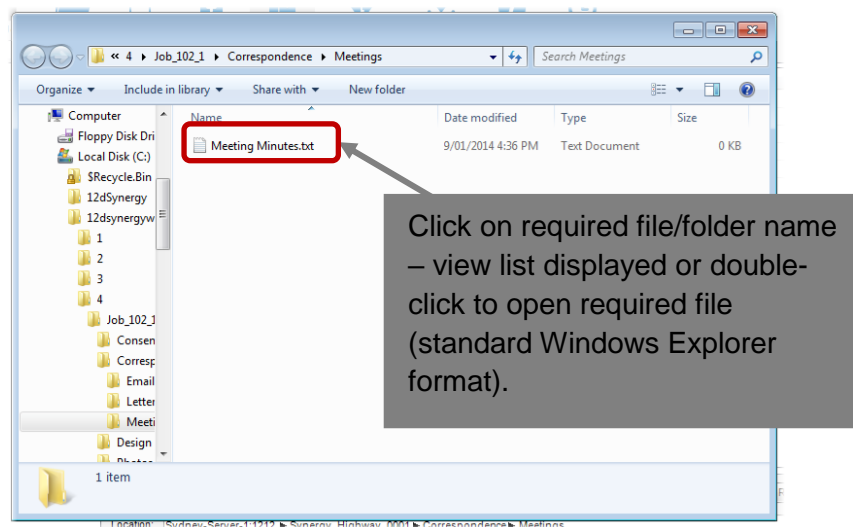
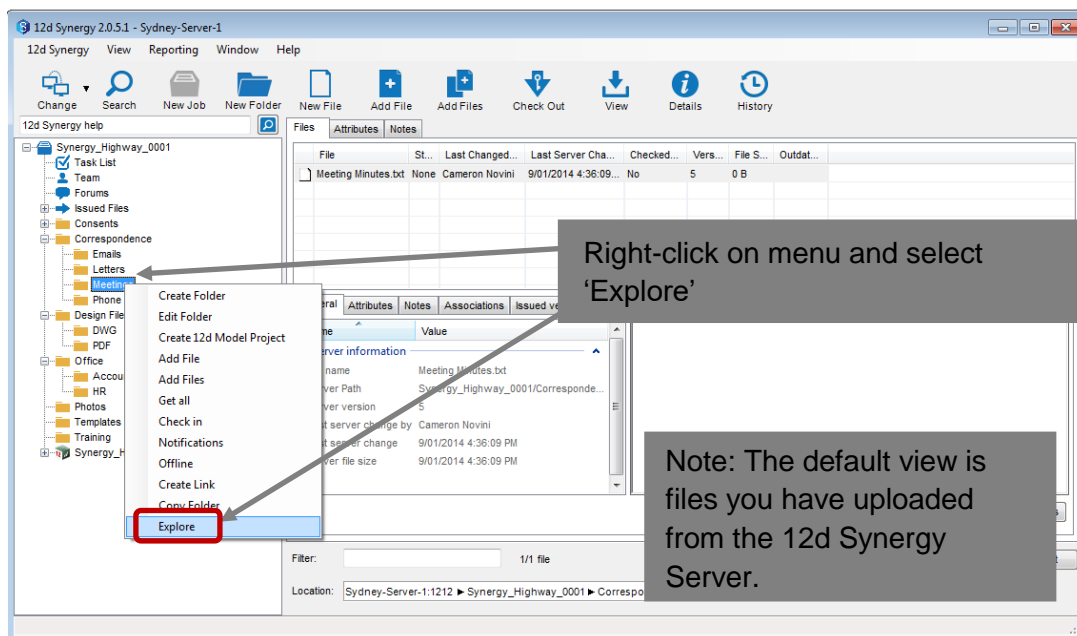
## 5.4.6 Attributes

Folders can have additional information attached as 'Attributes'. A good example is the Subject, Sender, and Receive Date and so on for an email. Custom attributes can also be attached to help describe folders in ways that make sense for your job, and can be used in searching.

Please see the Advanced User guide for information on attributes.

## 5.4.7 Finding a Folder in your workspace

You may wish to find where your data is stored on your local drive. To do so, you can simply follow the steps below.





## 6 Email Management

Emails can also be managed by 12d Synergy. The Email Management module in 12d Synergy still treats emails as 'files', but provides a special way to upload and track them. 12d Synergy also prevents duplicate emails from being uploaded – it can detect when an email sent to several people in the organisation is uploaded once and will mark the copies accordingly.

The interface to email management is via Microsoft Outlook 2010 or greater.

Managing your email with 12d Synergy means that all your emails are tracked in a central location, and the speed and power of 12d Synergy searching can be applied to them.

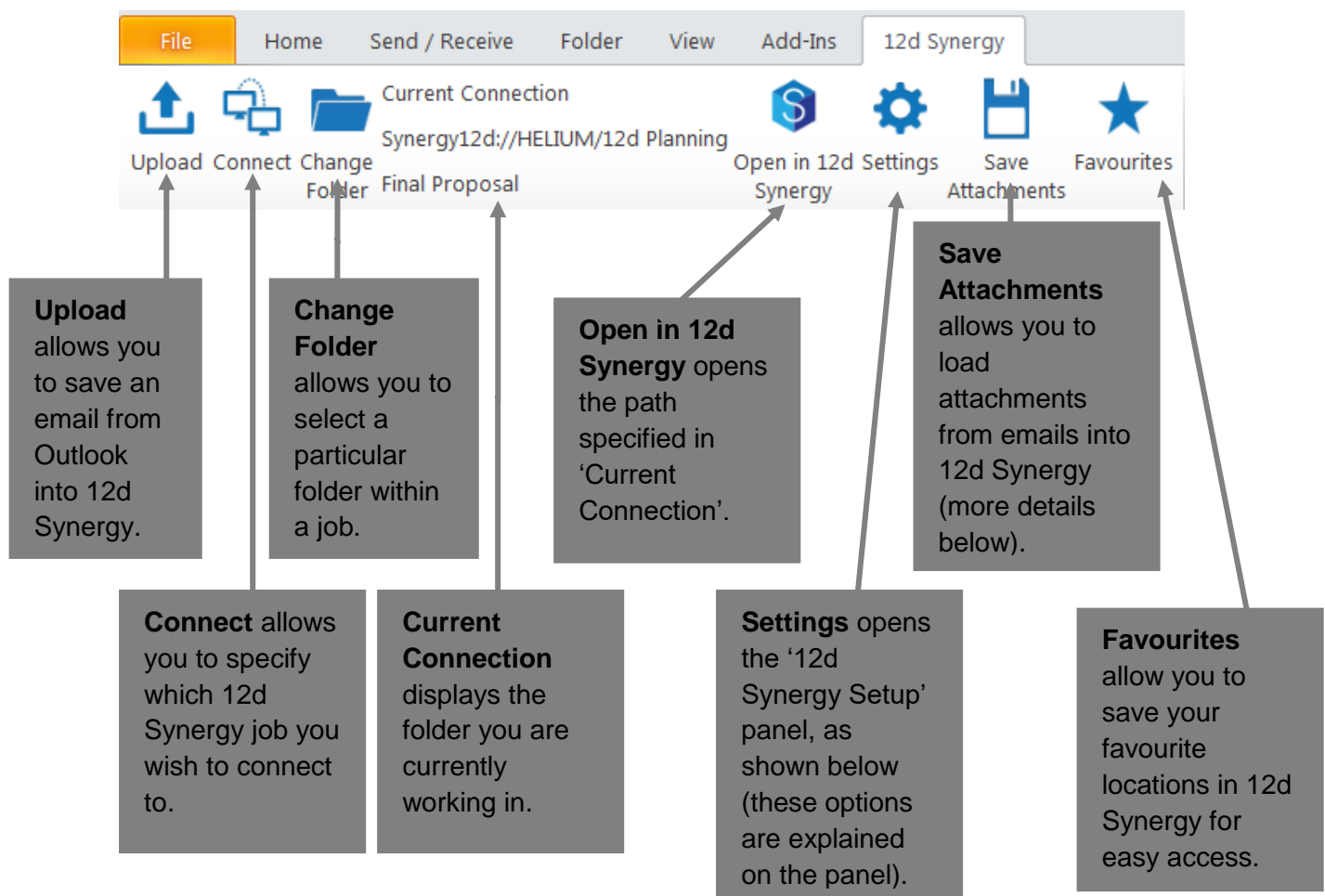
### 6.1 Email Stamping

When an email is uploaded to 12d Synergy, the subject is modified to include a stamp. This is configured by your administrator, but usually will take the format [#JobName]

This is used by 12d Synergy to track which jobs an email should go into. If it is a new email that has no stamp, Outlook will prompt you as to which job it should use.

### 6.2 Using Outlook with 12d Synergy

12d Synergy interfaces with Outlook (2010 and later) – the plug-in for Outlook has this set-up:





## 6.3 When are Emails Uploaded

When emails are uploaded depends on your settings, but generally, Outlook will attempt to upload emails whenever a new email is read or an email is sent, or if you click the Upload button.

## 6.4 Modes of Operation

There are several different ways you can interact with Outlook and 12d Synergy – largely, this is to do with when Outlook will attempt to send emails to 12d Synergy. You can choose which mode to run in by selecting the 'Settings' button.

The following modes are available:

**Automatic** - Always try to add any new or outgoing emails and will prompt for extra information about which job to use.

**Stamped Emails Only** - Always try to add stamped emails but will do nothing for emails without stamps

**Stamped Emails + Outgoing** – Always try to add stamped emails and prompt to add when sending emails

**Always Ask** - Always ask whenever a new email is read or an email is sent

**Manual Only** - Never prompt, lets you decide when to add an email

## 6.5 Jobs, Folders and Favourites

### 6.5.1 Changing Jobs and Folders

When you are uploading an email that does not have a stamp, you will be prompted to confirm where you would like to store your emails.

You will need to specify a folder and a job.

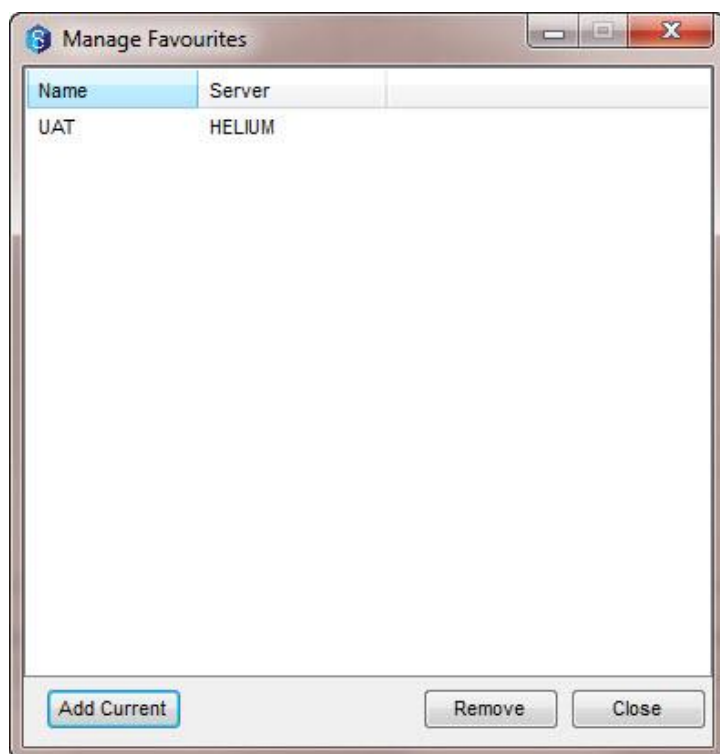
You can do this when you upload an email, or you can click the 'Change Folder' option on the 12d Synergy Ribbon.

Note that you will always be prompted to confirm the location of your email before an email with no stamp is uploaded, which gives you the opportunity to change the location, with a list of favourites and recent jobs available.



## 6.5.2 Favourites

You can set up favourite jobs by clicking the 'Change' drop down menu and clicking 'Favourites'. You can add your current job and remove existing ones..



## 6.6 Duplicate Emails

If two people receive the same email, 12d Synergy will detect this and prevent it from being uploaded. In fact, 12d Synergy will automatically convert it to an uploaded state so you don't need to worry about it.

## 6.7 Saving Attachments

When you upload an email, the attachments are automatically uploaded with it so that whenever you view the email, the attachments are still there.

However, you may wish to save the attachments separately. In this case, the attachments will automatically be associated with the email.

To do so, click 'Save Attachments' and select which attachments you wish to save.

You can also save the attachments under a different name, or replace an existing file, if required.



# 7 Tasks

Each 12d Synergy job can contain tasks to describe work that must be completed. Each task has a variety of different settings, most of which are optional. Some of these include:

- Name
- Description
- Type
- Priority
- Status
- Current Progress
- Who it is assigned to
- Start Date
- End Date

## 7.1 Concepts

### 7.1.1 Task History

Any change to a task requires a description, to help describe how the task has changed over time.

### 7.1.2 Status

A task must also have a status. Statuses can be defined by your administrator, who can also define when one status can move to another. For example, you may not be able to move a Task from Open to Closed without it going through a 'Review' state first.

### 7.1.3 Type

A task must have a type – this helps define information about what the task is for, and may include other information such as attributes or even create a series of sub-tasks automatically.



## 7.2 Creating Tasks

**Allows use of prefixes.**

**Generic or select from the drop-down template.**

**Select Priority from pop-down menu:**  
Trivial, Low, Medium, High or Critical

**State** Not Started

**Button to select option from menu.**

**Select State from drop-down menu:**  
Not Started, In Progress, Closed or Cancelled

**Displays person or team this task is assigned to.**

**Clicking on the button to the right of this field pops up an 'Update assigned user' panel for you to assign this task by choosing one of the following options:**  
'Select a contact' **or** 'Select a team role'

**Clicking on tabs show the following information:**

**Description:**

**Attributes:**

**Dependencies:**

**Reminders:**

**CCs:**

**Associations:** Files associated with this task

**No date**  
Fixed date  
Relative to start date  
Relative to parent start date  
Relative to parent due date  
Relative to latest dependency start date  
Relative to latest dependency due date  
Relative to date job created



## 12d Synergy Getting Started Guide



This will display all tasks for that Job.

To create a new task, click here:



or use the keyboard shortcut **Ctrl+N**.

This brings up the 'Create Task' panel:

Type a name for your task

ID gives the task a prefix, e.g. a number or letter

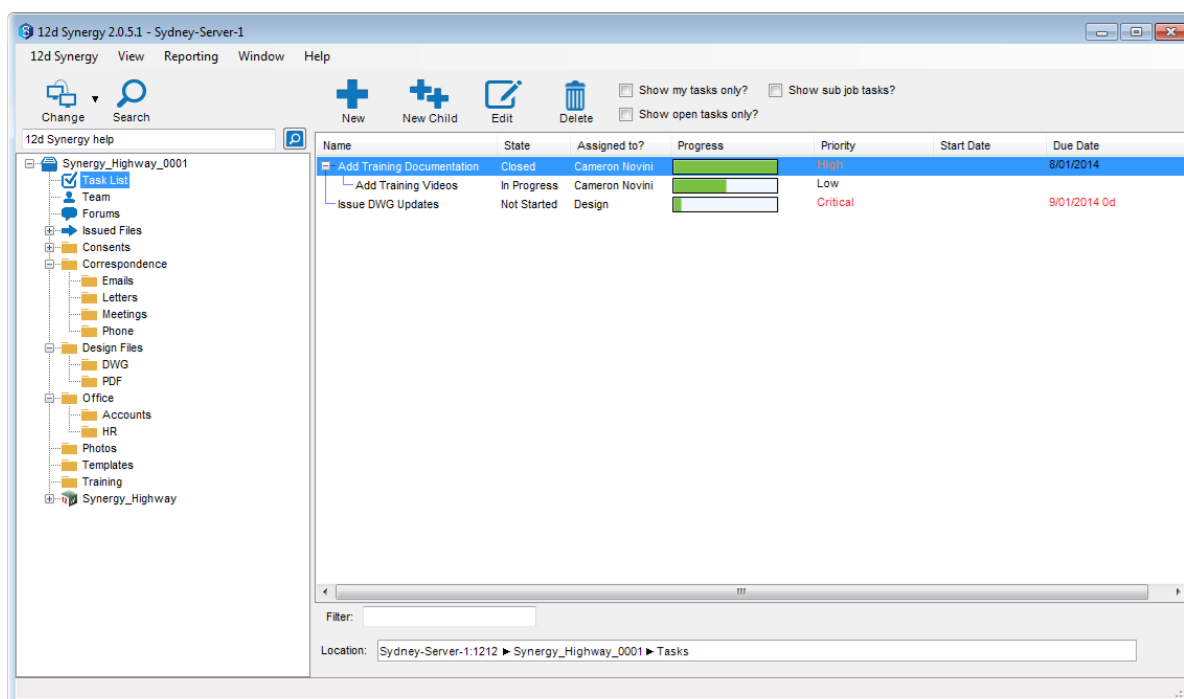
'Type' allows you to assign tasks to previously defined templates.

Set priority – from 'Trivial' to 'Critical'.

State can be adjusted along the way as the task progresses: choose 'Not Started', 'In Progress', 'Closed' or 'Cancelled'.

Start typing a name (it will auto-complete) or click the '...' button to search from a directory.

Set Start Date and Due Date if required. These dates can be set to be relative to a Parent Task date, and the Due Date can be set as relative to the Start Date.

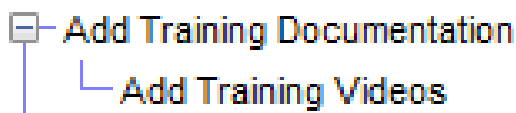


Any task in 12d Synergy can have a 'Child Task' created under it. This is achieved using the 'New Child' button:

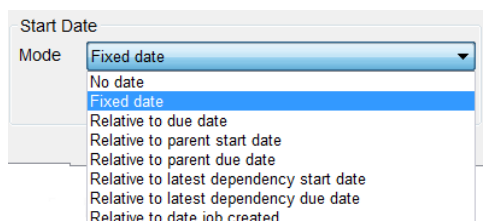


or the keyboard shortcut **Ctrl+Shift+N**.

'Child' tasks are displayed under the Parent task in a tree as shown:



Clicking this button brings up a new 'Create Task' panel for you to fill in as listed above. This is where the aforementioned concept of a 'parent task' comes into play – the Start Date and Due Date for this Child Task can be set as relative to the dates of the Parent Task, as shown:

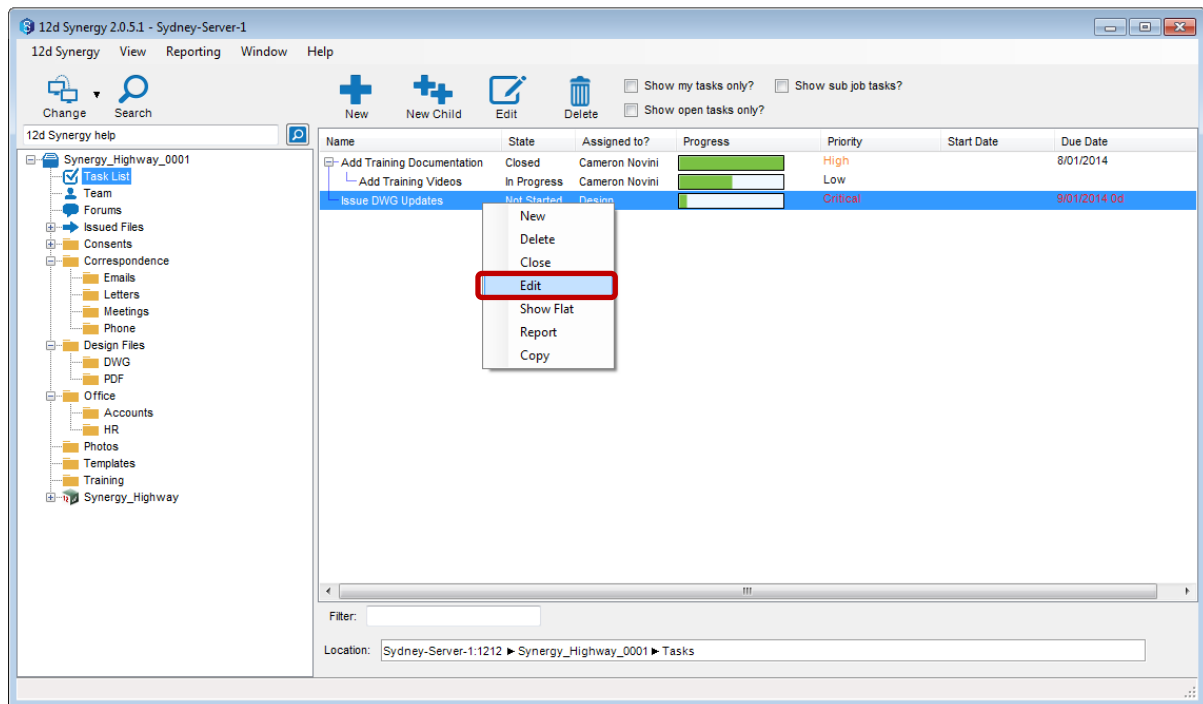


Please note: When setting a Due Date to fall before the Due Date of the parent task, the number of days must be set as a negative number.



## 7.4 Editing a Task

To edit a task, double-click on its name in the tree, right-click its name and then left-click 'Edit':



or click the Edit button (highlight focus must be on the correct task name):



This will bring up the 'Edit' panel:



**Edit Issue DWG Updates**

Name: Issue DWG Updates

ID (optional):

Type: Generic

Priority: Critical

State: Not Started

Progress: 7

Assigned to: Design [Role]

Start Date: No date

Due Date: Fixed date

Thursday, 9 January 2014

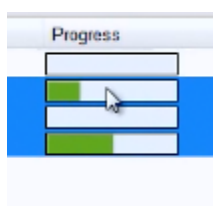
Details | Attributes | Dependencies | Actions | Reminders | CCs | Associations | Notes

Task History

User	Time	Action
Cameron Novini	09/01/14 05:07	hh
Cameron Novini	08/01/14 10:19	Added DWGS
Cameron Novini	08/01/14 10:18	Item created

Buttons: Delete, Report, Submit, Cancel

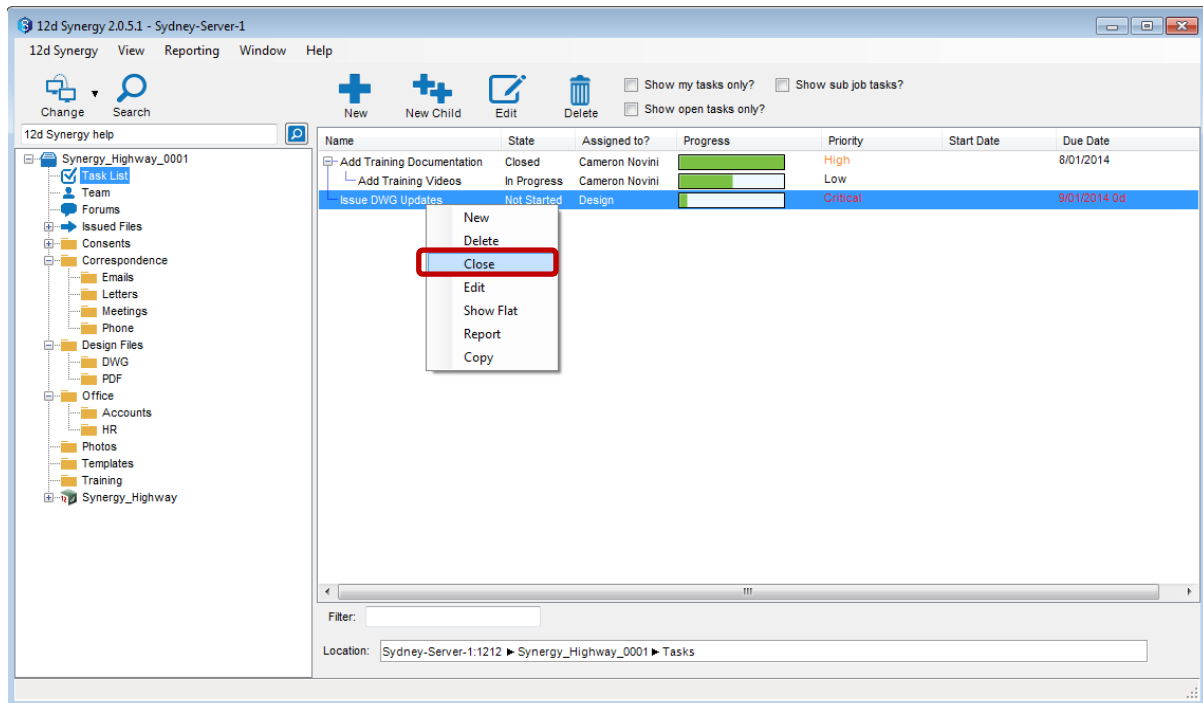
Here, aspects of the task can be edited in the same fashion as they were entered in the section on creating tasks. An example of a common edit to a task would be updating its progress as the user has begun working on the task. Tasks in progress are indicated as shown here:



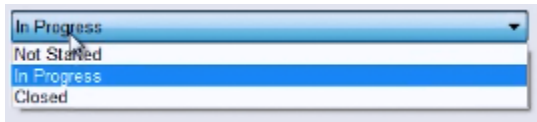


## 7.5 Completing Tasks

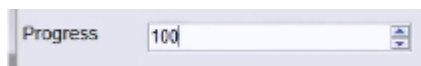
There are several methods to mark a task as completed in 12d Synergy. The fastest is to right-click the task name and left-click 'Close':



You can also follow the instructions for editing the task and then mark it as 'Closed' in the State section:



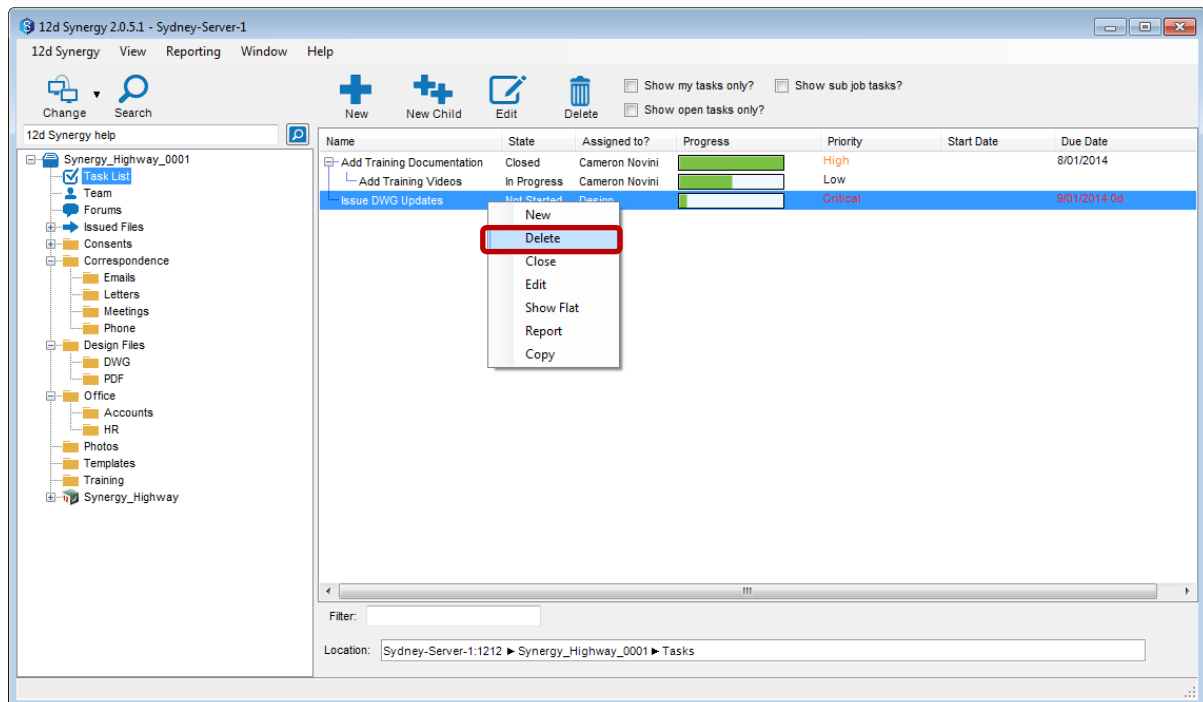
Alternatively, you can mark the Progress as 100(%):



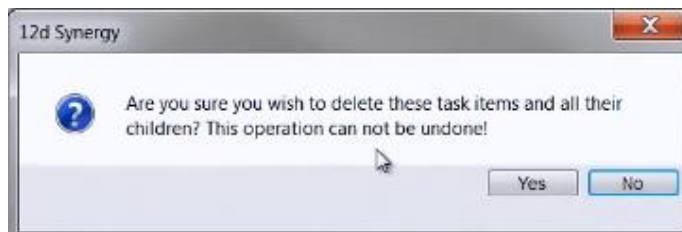


## 7.6 Deleting a Task

To delete a task, right-click on the task name and left-click 'Delete', or highlight the task and click the Delete button:

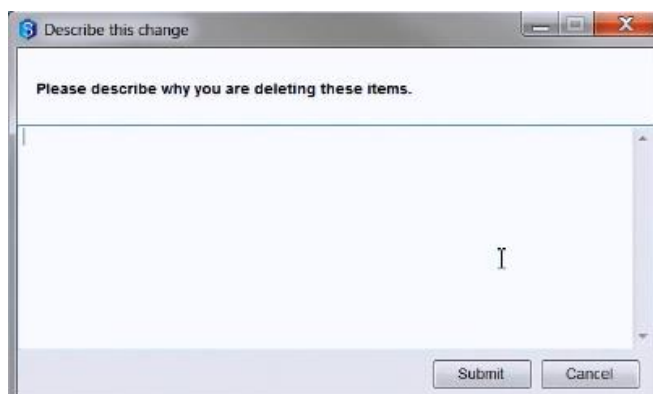


This brings up this warning panel:



Unlike deleted files, a deleted task cannot be recovered – this is generally a permanent deletion.

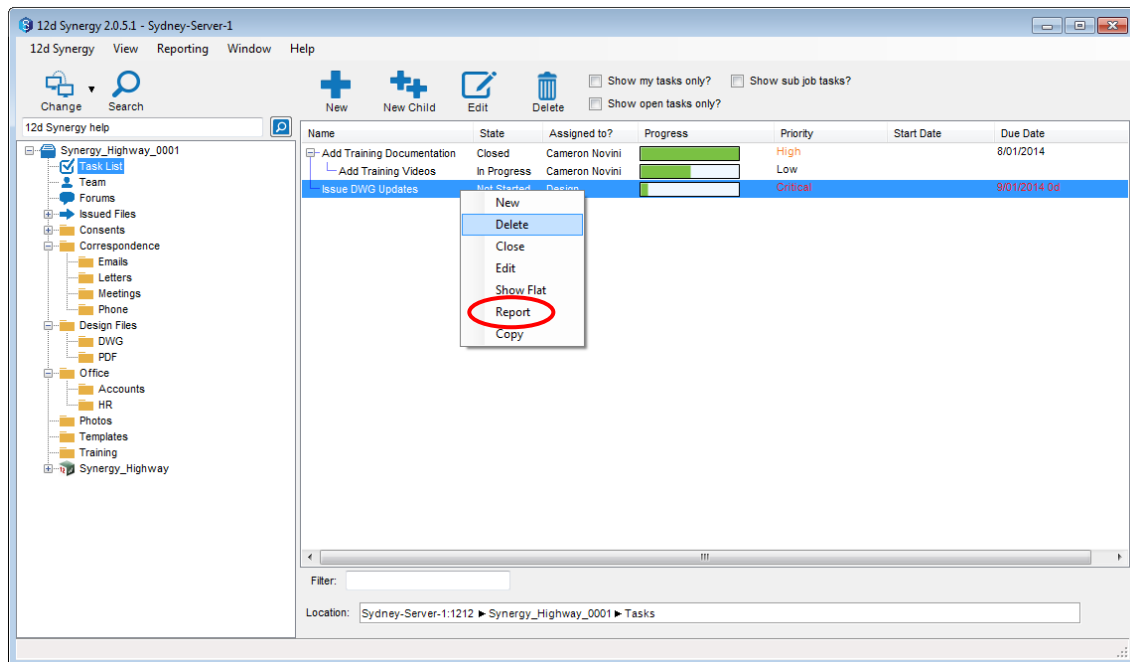
After you have clicked 'Yes' to delete the task, you will be asked to describe why you have deleted it:



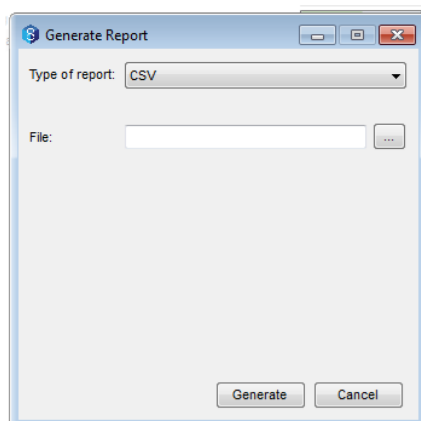


## 7.7 Creating a Task Report

To create a report on a task, right-click the task name and left-click 'Report':



From here, select your report type:



'Printed' reports are sent to your printing device, 'HTML' reports generate HTML files you can save to your computer (see sample report below), and 'Tab Delimited' reports will be explained in the Advanced User Guide.

## 7.8 Attributes

Tasks can require attributes be filled out before they are updated. These are often defined by your administrator.

Details on this section can be found in the Advanced Manual.

## 7.9 Notes

Notes can be attached to tasks, just like in files. This is a helpful way to communicate reminders and other ideas. To find out how to view and add notes, please see section 0



## **7.10 Reminders**

Reminders can be set before or after the due date. A reminder will send you or nominated parties an email when the reminder is due.

Details on this section can be found in the Advanced Manual.

## **7.11 Dependencies**

Some tasks might be dependent on others. Dependencies help you track this, and can be used to trigger other actions such as emails being sent.

Details on this section can be found in the Advanced Manual.

## **7.12 Associations**

Tasks can be associated with other items in 12d Synergy. If you associate a task with a file, checking in that file will prompt you with the option to update the task as well.

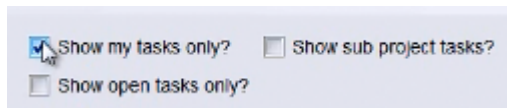
Details on this section can be found in the Advanced Manual.





## 7.13 Other Useful Information on Tasks

This section of tick boxes:



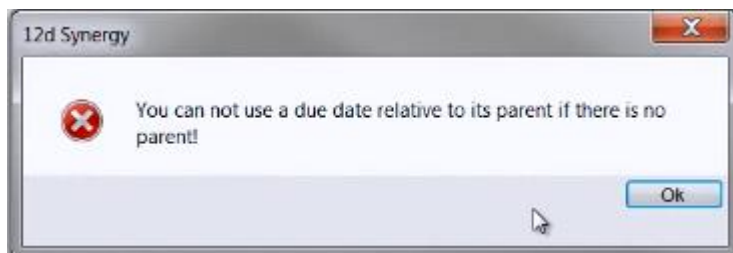
is very handy for filtering which tasks you see. Often it is useful to only see your own tasks, and/or to only see open tasks.

Some users may wish to show/hide sub-job tasks in this view, so there is also a tick box option for that, as shown above.

Child tasks can be clicked and dragged to be turned into the children of other tasks, including other child tasks (this latter action creates a new tree branch).

Child tasks can also be clicked and dragged into the white space below the tree to be turned into parent tasks.

Please note: An error can occur with this when relative dates have been set:

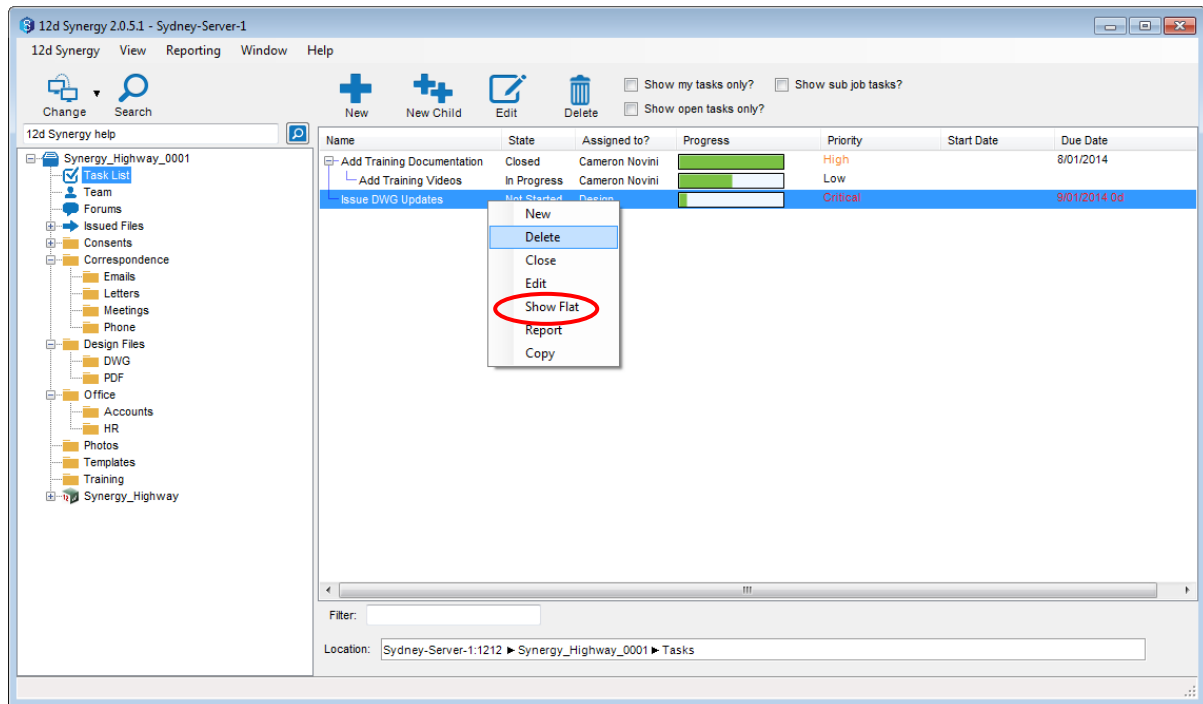


As in Windows Explorer, each column has options for sorting by that column, in various orders.



## 7.14 Show Flat/Show Tree Tasks

The right-click option 'Show Flat' shows all tasks, without the tree hierarchy.





## 8 My Active Items

The My Active Items window keeps track of all the items that are important for you. These include:

Any tasks that are open and assigned to you

The 'My Active Items' panel is a quick way to view all the outstanding tasks and checked out files you have within your job tree:

The screenshot shows the 'My Active Items' window with a table of tasks. The table has columns for Name, State, Progress, Priority, Start Date, and Due Date. The 'Progress' column shows green bars indicating the completion status of each task. The 'Priority' column shows the priority level for each task, with 'High' in orange and 'Low' in blue. The 'Due Date' column shows the due date for each task, with some dates in red indicating they are overdue.

Name	State	Progress	Priority	Start Date	Due Date
Synergy_Highway_0001					8/01/2014 -1d
Add Training Documentation	Closed		High		8/01/2014
Add Training Videos	In Progress		Low		

Progress is highlighted for each task

Priority is indicated for each task (Critical, High, Medium or Trivial)

You can turn the My Active Items window on or off under the Window menu.



## 9 Notes

Notes can be attached to different items in 12d Synergy and are a helpful way to communicate reminders and other ideas.

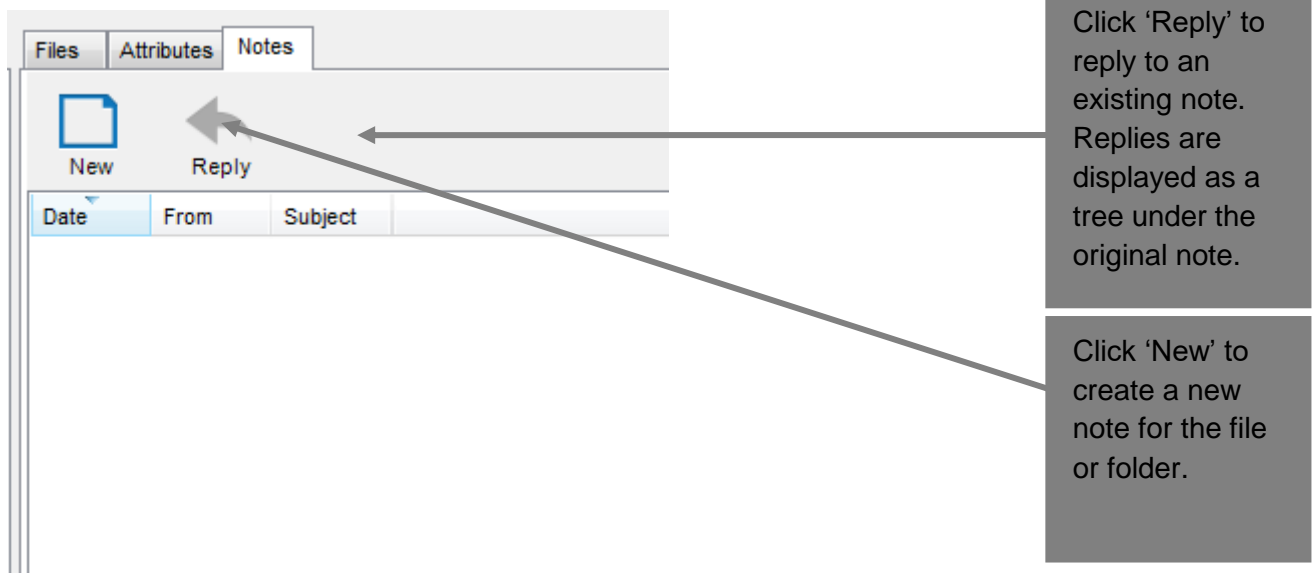
The items that can have notes attached are:

- Files
- Folders
- Jobs
- 12d Model Projects
- Tasks

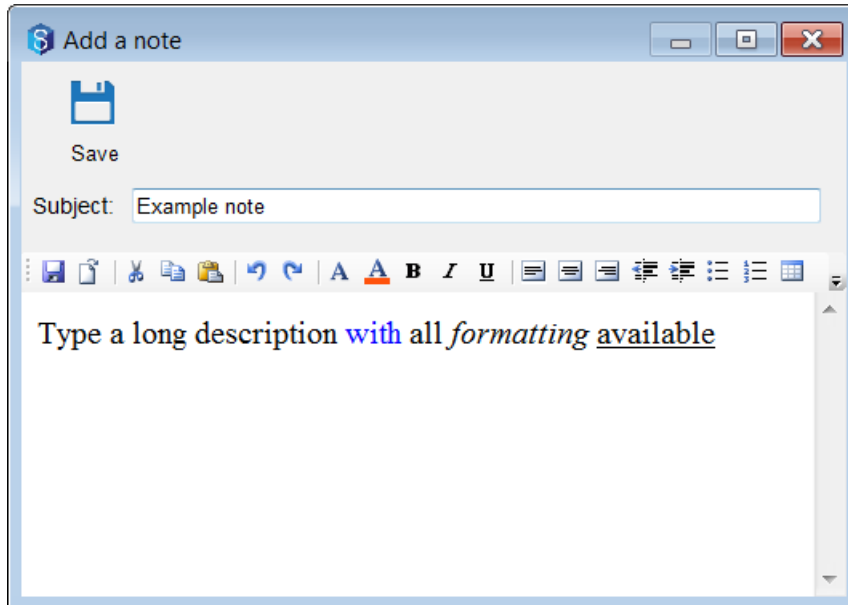
To see the note for an item, select the item and find the Notes tab. The following example is for a folder.

To create a note for a folder, highlight the folder and select the 'Notes' tab at the top of the screen:

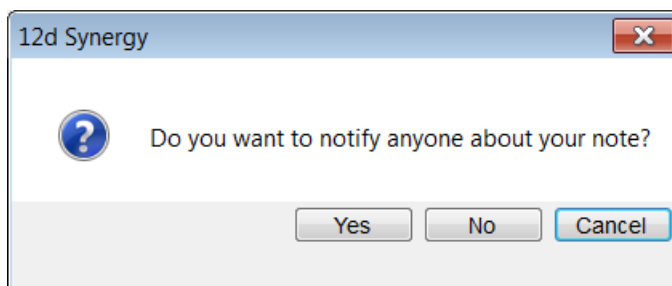
Whether creating a note for a file or a folder, the appropriate 'New' button will need to be pressed.



The 'Add a note' panel will then appear:



Fill in the details of your note and click 'Save'. You will be prompted to notify others about your note if you wish to at this point:



From here, if you say yes, you can select contacts to notify.

To place a note on an individual file, follow the same method, but with a file name highlighted instead of a folder name.



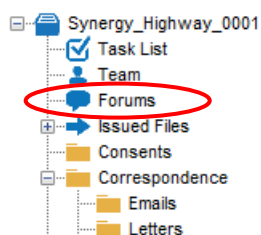
# 10 Forums

Forums are a great way for users to communicate with one another in regards to a specific job. A job can contain one or more forums, each of which is broken down in terms of user defined categories.

When posting to a forum, you can incorporate files and images from within 12d Synergy.

## 10.1 Working with Forums

Forums exist within 12d Synergy, but this option only shows if there is a forum for that job. To navigate to the Forums for your current job or sub-job, click 'Forums' on the left-hand side tree:

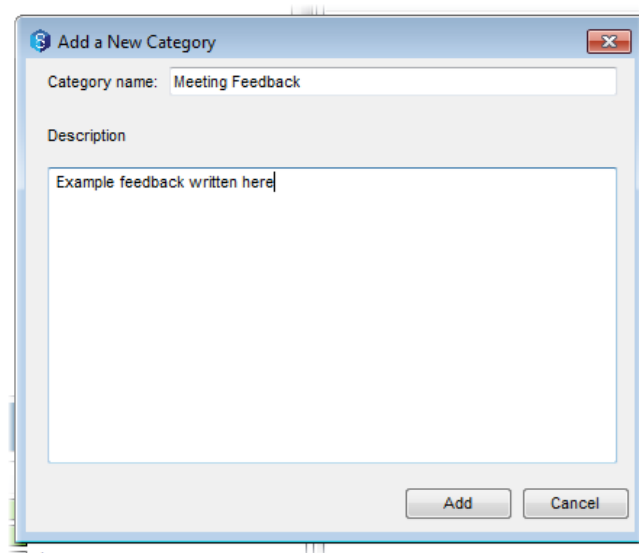


### 10.1.1 Creating a New Category

To create a new category within a forum, click the 'Add Category' button in the Tool Bar:



This will bring up the 'Add a New Category' panel:



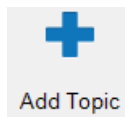
Fill in the details as prompted and click the 'Add' button.

The category will then appear on the right-hand section of the window. Double-click on the text of the category heading to open it.



### 10.1.2 Creating a New Topic

Once within the category, click the 'Add Topic' button to add a new topic:



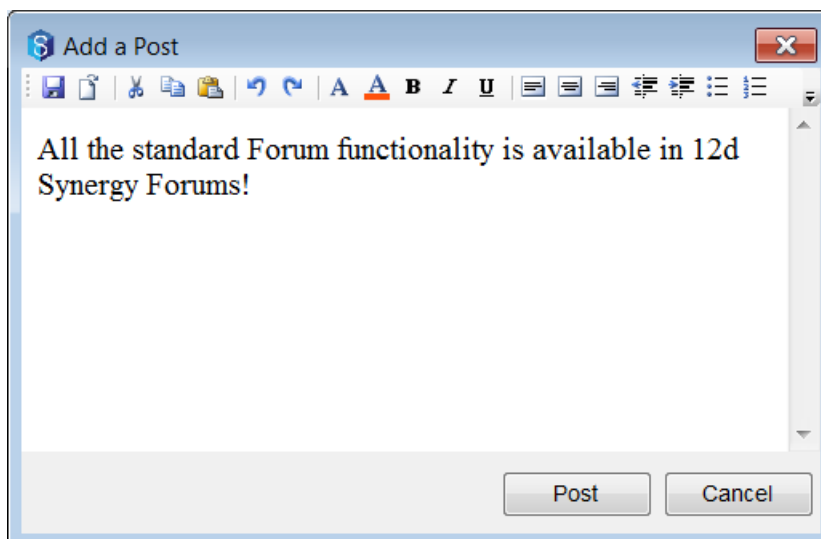
The 'Add a Topic' panel will appear, fill in the details of your new topic and click 'Post'.

### 10.1.3 Creating a New Post

To create a new post within a topic, click the 'New Post' button:

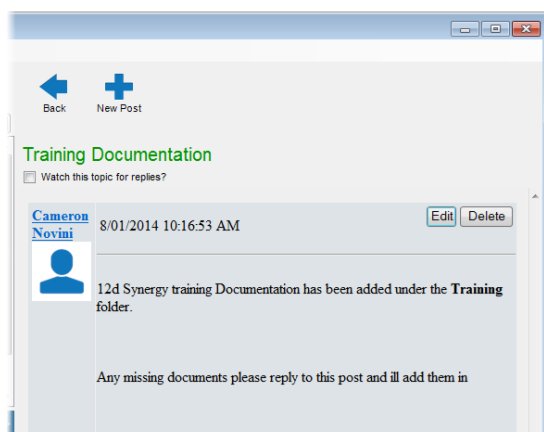


The 'Add a Post' panel will appear:



Fill in the post details and click 'Post'.

Your posts will appear as a list under the topic. You can edit or delete your posts using the buttons. A tick box also exists to indicate whether you want to watch for replies to the post – this feature allows you to receive an email if anyone replies to your topic.





#### **10.1.4 Replying to a Post**

To reply to a post, simply click 'Reply' when viewing the post. You can fill out your reply just as if you were creating a new post.

#### **10.1.5 Watching for new posts**

You can be alerted about new posts for a category or topic, simply by checking the 'Watch this Topic/Category' box. If you no longer want to receive notifications, simply turn it off again.





# 11 Glossary

Term	Description
Job	The highest level 'group' of data in 12d Synergy
Folder	A folder that may contain files or other folders
Check Out	Take a copy of a file and lock the file for editing
Check In	Update the file on the server and release it for other people to edit
Get	Download the latest copy of a file
Attribute	A piece of meta data that describes an entity in the system in some custom way
Note	A piece of information attached to an entity
Forum	A collaborative way for users to communicate, broken down into user defined topics and categories
Task	An item of work that may be assigned to a user, with an optional start and end date
Contact	Information about a particular person or company, such as name, contact details
User	A user who can log into the system
Association	A helpful way to associate one entity with another, to indicate there is some relationship